IDEXX **Cornerstone***
Practice Management System

Cornerstone 8.1 Single Location Inventory

IDEXX LABORATORIES

Cornerstone 8.1 Single Location Inventory
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Section 1

Introduction

Introduction

Purpose

The purpose of this training tool is to provide a way for users to learn Cornerstone Inventory. This print-based tool can be used as a self-paced training option.

Course Description

The Single Location Inventory training is designed for inventory managers at all levels, whether you are just getting started or want to maximize utilization.

Getting Started

Important!

Throughout the workbook, you will be working in your live Cornerstone database. This will allow you to make changes and learn using your inventory items and setups.

Training Content

Content of the training includes these sections:

- Introduction
- Cornerstone Resources
- Getting Started
- Purchasing
- Depleting, Adjusting and Receiving
- Inventory Reports

Key Learning Features

The sections in this training tool are presented in a chapter/lesson format and include these key learning features:

- Demonstrations
- Example Images

This icon refers to tips that are provided to enhance the basic information covered in the content.

This icon refers to notes that are provided to include additional information of special note.

This icon refers to important information; read this information carefully.

Trainer-Led Demonstrations provide specific instructions and tasks for you to complete in the Cornerstone Training Files. These demonstrations provide a “hands on” training activity.

[ ] Use the information in the brackets for Cornerstone data entry.

Trainer-Led Explanations provide an explanation of the concepts.

- Skill Assessment & Training Evaluation
- Appendix

Prerequisites

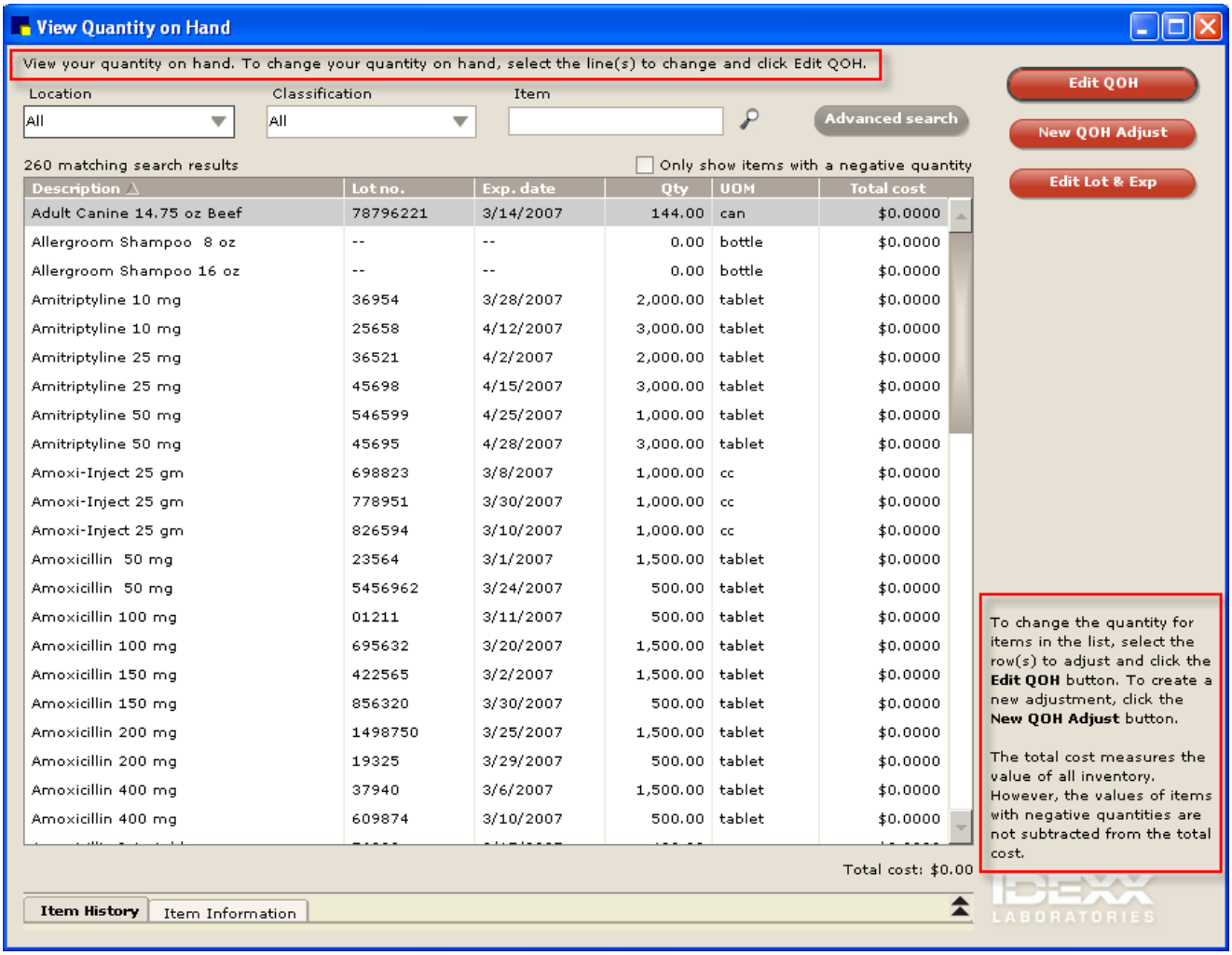
The following prerequisites are needed by a learner who will use this training tool:

1. Cornerstone 8.1 installed at practice.
2. Basic Cornerstone navigation.

Help

On Window Help/Information

Instructional information can be found in two places: under the window title and in the lower right-hand corner of many of the Cornerstone Inventory windows.


View Quantity on Hand
View your quantity on hand. To change your quantity on hand, select the line(s) to change and click Edit QOH.
Location
All
Classification
All
Item
Advanced search
Edit QOH
New QOH Adjust
Edit Lot & Exp
260 matching search results
Only show items with a negative quantity
Description
Lot no.
Exp. date
Qty
UOM
Total cost
Adult Canine 14.75 oz Beef 78796221 3/14/2007 144.00 can $0.0000
Allergroom Shampoo 8 oz -- -- 0.00 bottle $0.0000
Allergroom Shampoo 16 oz -- -- 0.00 bottle $0.0000
Amitriptyline 10 mg 36954 3/28/2007 2,000.00 tablet $0.0000
Amitriptyline 10 mg 25658 4/12/2007 3,000.00 tablet $0.0000
Amitriptyline 25 mg 36521 4/2/2007 2,000.00 tablet $0.0000
Amitriptyline 25 mg 45698 4/15/2007 3,000.00 tablet $0.0000
Amitriptyline 50 mg 546599 4/25/2007 1,000.00 tablet $0.0000
Amitriptyline 50 mg 45695 4/28/2007 3,000.00 tablet $0.0000
Amoxi-Inject 25 gm 698823 3/8/2007 1,000.00 cc $0.0000
Amoxi-Inject 25 gm 778951 3/30/2007 1,000.00 cc $0.0000
Amoxi-Inject 25 gm 826594 3/10/2007 1,000.00 cc $0.0000
Amoxicillin 50 mg 23564 3/1/2007 1,500.00 tablet $0.0000
Amoxicillin 50 mg 5456962 3/24/2007 500.00 tablet $0.0000
Amoxicillin 100 mg 01211 3/11/2007 500.00 tablet $0.0000
Amoxicillin 100 mg 695632 3/20/2007 1,500.00 tablet $0.0000
Amoxicillin 150 mg 422565 3/2/2007 1,500.00 tablet $0.0000
Amoxicillin 150 mg 856320 3/30/2007 500.00 tablet $0.0000
Amoxicillin 200 mg 1498750 3/25/2007 1,500.00 tablet $0.0000
Amoxicillin 200 mg 19325 3/29/2007 500.00 tablet $0.0000
Amoxicillin 400 mg 37940 3/6/2007 1,500.00 tablet $0.0000
Amoxicillin 400 mg 609874 3/10/2007 500.00 tablet $0.0000
Total cost: $0.00
Item History
Item Information
To change the quantity for items in the list, select the row(s) to adjust and click the Edit QOH button. To create a new adjustment, click the New QOH Adjust button.
The total cost measures the value of all inventory. However, the values of items with negative quantities are not subtracted from the total cost.
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Cornerstone Reference Resources

There are three reference resources for you to access if you have questions while using Cornerstone. Cornerstone Help can be accessed with the Cornerstone software. The Cornerstone Administrator's and User's Manuals are available from icons located on your desktop or from the Start menu. The Online Cornerstone Customer Support Center is a website designed to provide you with general information for questions you may have, training materials, and it is accessible through Cornerstone or any internet browser.

Using Cornerstone Help

Cornerstone Help can be accessed three ways. You can:

- Press **F1** for content-specific help.
- Click the **Help** toolbar button
- Select **Help** on the **Menu** bar and select either **Contents** or **Search For Help On**.

Observe MicroHelp that displays on the left side of the Status Bar.

Using Cornerstone Administrator's Manual and Cornerstone User's Manual

The *Cornerstone Administrator's and User's Manuals* are accessed through the Cornerstone Program menu rather than through the Cornerstone software. Use the manuals to supplement your learning, gain additional information on a topic or help to answer questions you have in the future that you can't find the answers to in this book.

To access either manual, click on **Start** > **All Programs** > **Cornerstone** > **Manuals**.

Online Cornerstone Customer Support Center

You can access the support center 24 hours a day, 7 days a week, 365 days a year just by:

- Selecting **Cornerstone** > **Help** > **Support Center**
- Clicking the **Support Center** toolbar button.
- Typing Cornerstonehelp.com in any internet browser

Section 2

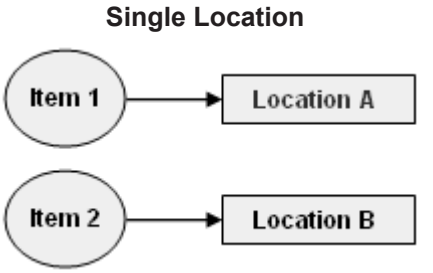
Getting Started: Phases and Setup

Phase 1: Understand Basic Workflow and Unique Capabilities

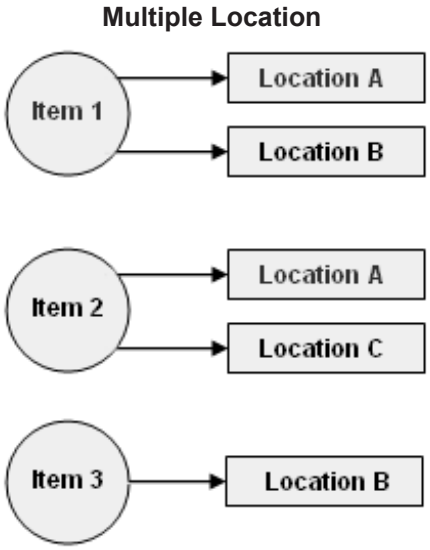
Cornerstone Inventory Management has these unique capabilities that allow you to reach your desired level of total inventory cost, profit margins, turnover and accurate quantities:

- Follows a basic inventory management workflow of purchase, receive and deplete
- Single location inventory tracking whereby one invoice item is tracked at one location (i.e. Invoice Item A @ Location 1, Invoice Item B @ Location 2) or multi-location inventory tracking whereby one invoice item tracked at two locations (i.e. Invoice Item A @ Location 1 and Invoice Item A @ Location 2)
- Ability to order by want list and/or suggest list
- Key reports such as the Cost of Goods Sold Report

Single Location Per Invoice Item



Multi-Location Per Invoice Item

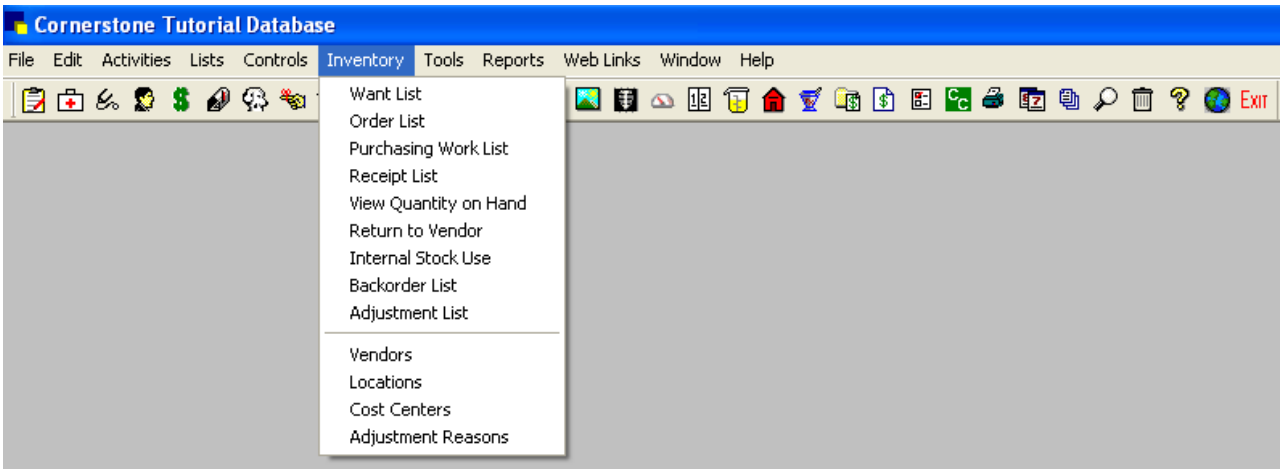


Phase 2: Decisions and Setup Before Invoice Item Information

<table>
<tr><th></th><th>Checklist Item</th><th>Explanation</th></tr>
<tr><td>☐</td><td>1. Pick a Beginning Category (Classification or Subclassification)</td><td>For a manageable project, select one classification or subclassification to begin tracking inventory quantities on hand. A recommended classification is food. It is straightforward for a beginner to set up and count.</td></tr>
<tr><td>☐</td><td>2. Set Initial Inventory Security</td><td>Turn on security for staff who are responsible for inventory management setup. Use the OM column found on the Inventory Security Setting Guide in the Appendix.</td></tr>
<tr><td>☐</td><td>3. Review and move items within the chosen category</td><td>Evaluate/move invoice items within these classes/subclasses, if needed.
Print the Invoice Item Setup Report for this category: Reports > Invoice Item > Invoice Item Setup Report. Select the range of Class ID or Subclass ID.
Some of the items may need to be changed from service to inventory. Some items might not belong in this category and you'll need to move to another classification or subclassification.</td></tr>
<tr><td>☐</td><td>4. Review and set up units of measure for chosen category</td><td>Identify the normal buy and minimum sell quantities for chosen category.<table><tr><th>Item Examples</th><th>Buy</th><th>Minimum Sell</th></tr><tr><td>Injectables</td><td>Vial</td><td>CC</td></tr><tr><td>Heartworm</td><td>Box</td><td>Package</td></tr><tr><td>Heartworm</td><td>Box</td><td>1 Dose</td></tr></table>Ensure they are set up. Review and set up under Controls > Units of Measure.</td></tr>
<tr><td>☐</td><td>5. Set up vendors for chosen category</td><td>Collect vendors and information for this category: Vendor name, address, website, contact name, contact phone #, contact email address. Set up under Inventory > Vendors.</td></tr>
<tr><td>☐</td><td>6. Set up locations for chosen category</td><td>Set up the locations where this category is kept. Keep in mind that you can print various reports by location, such as the Inventory Counts Report, and then hand that location report to individual staff members when physical counts need to be taken. Set up under Inventory > Locations.</td></tr>
<tr><td>☐</td><td>7. Make lot and expiration date tracking decision for chosen category</td><td>Make management decision and choose one of the four tracking options:
☐ Track neither lot nor expiration date but only quantities
☐ Track lot only
☐ Track expiration date only
☐ Track lot and expiration date, along with quantities
Use this decision criteria:
1. Staff will need to enter or select the level of inventory detail you set at any of the consumption windows: (Patient Visit List, Whiteboard, Prescription, Rabies, or Invoice).
2. Cornerstone allows staff to enter a lot and expiration date on the fly at consumption (Patient Visit List, Whiteboard, Prescription, Rabies, or Invoice), which means they could enter an invalid option and it would need to be corrected.
3. A manually entered lot/exp, will require a manual correction by inventory staff, even if the manually entered info is correct or the result will create a negative QOH for those items. You can print the Invoice Item Sales Information for a specific lot number to see a list of clients that purchased an item with a given Lot Number.</td></tr>
</table>

Accessing Inventory Management

Access Inventory from the Cornerstone Menu bar.

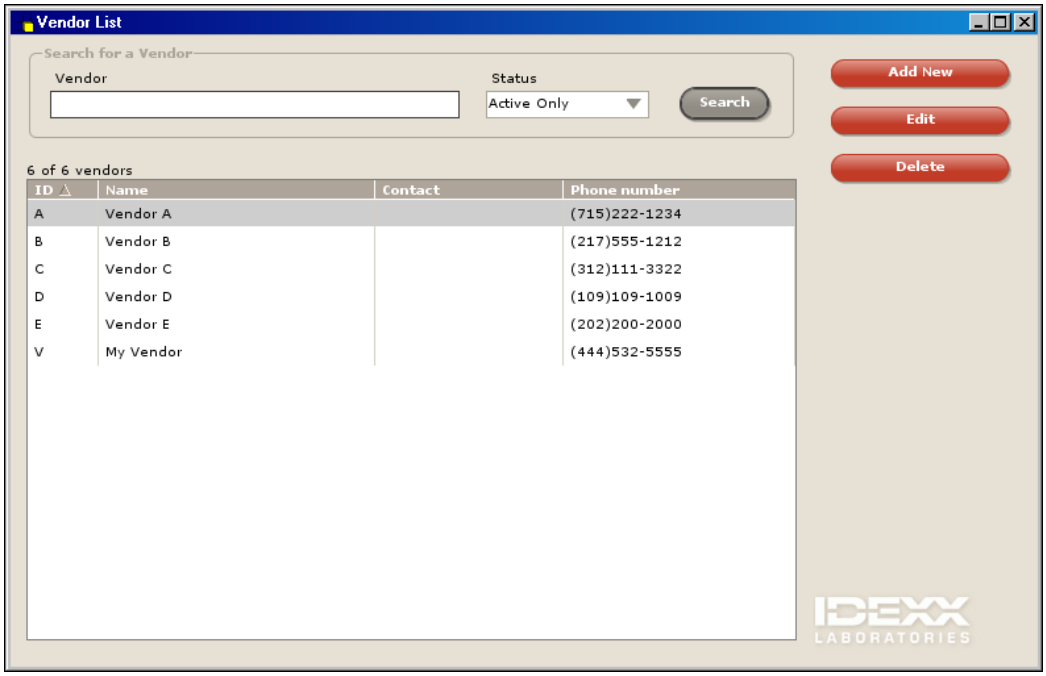


Set Up Vendors, Locations, Cost Centers, and Units of Measure

Vendor List Overview

To open the *Vendor List* window, select **Inventory > Vendors**. The *Vendor List* displays active vendors used by the practice to place orders, receive and return inventory. From the *Vendor List* window, add new vendors, edit existing vendors, and delete unused vendors.

tip You may NOT delete a vendor that has previously been used; vendor status can be set to inactive.



When looking for a specific vendor, enter information in one or more of the criteria fields provided and click **Search**. Vendors that match the criteria display on the *Vendor List*.

Search for a Vendor fields include:

- *Vendor* field: Type the beginning letters or the full name of a vendor.

  The *Vendor* field is not case sensitive.

  tip Use the % sign followed by a combination of letters to find any vendor whose name contains the combination. Searches cannot be performed on vendor IDs.

- *Status* list: Select the status of the vendor. Choices include **All**, **Active Only** or **Inactive Only**.

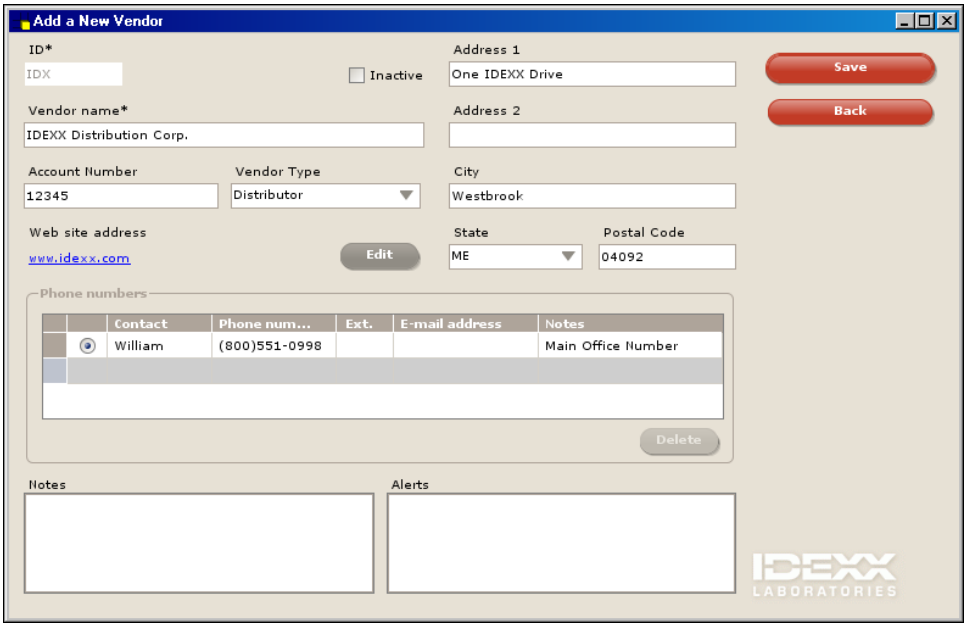
Adding a New Vendor

In this exercise, you will add or modify vendor information using the information on a vendor's invoice.

1. Select **Inventory** > **Vendors**. The *Vendor List* displays active vendors set up by the practice.
2. Click **Add New** or **Edit**. The *Vendor Information* window displays.
3. Complete the information in the *Vendor Information* window.

> **tip** If the ID entered already exists, the field label will display in red (ID). The system will not allow a user to enter further vendor information until the ID is unique.

4. Click **Save**.
5. Close the *Vendor List* window.



Adding a Location

More than one location can be set up by the practice for tracking inventory. Each inventory item can be assigned to one location. Examples of locations include: room names, room numbers, shelf numbers, reception areas, stockrooms, trucks, refrigerators, lock boxes, kennels, and controlled substance cabinets.

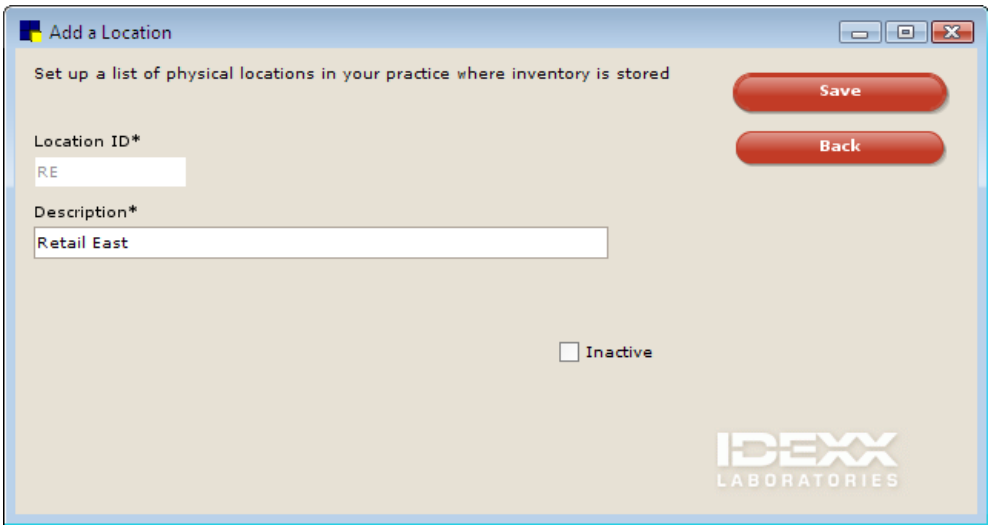
Notes:

- At least one location is required if your practice wishes to track the quantity on hand of inventory items.
- Check to see if you have 'Central Storage' as a location and if you intend to have only one location for all inventoried items, skip this lesson.
- You may only receive inventory items (regardless of QOH tracking status) into inventory (not service, group, dispensing, or pick items).

tip Locations can be deleted if not used or inactivated if no longer used and items are moved out of the location.

In this demonstration, we will review or modify your location list.

1. Select **Inventory > Locations**. The *Locations List* displays all existing locations.
2. Click **Add New** or **Edit**. The *Add a Location* window displays.
3. Complete the details in the location information window.
4. Click **Save**. The *Locations List* displays.
5. Close the *Locations List* window.



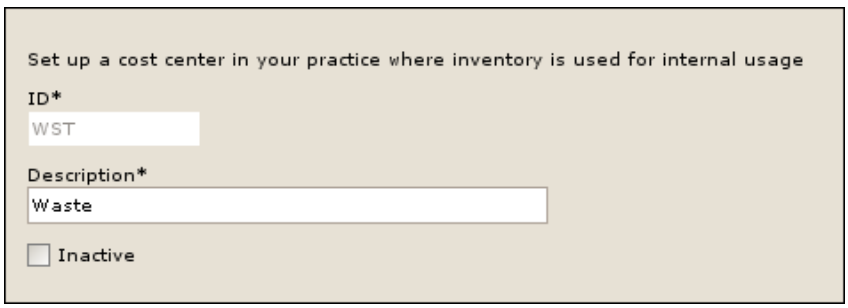
Adding a Cost Center

Inventory items that are consumed by the practice but not invoiced to the clients can be depleted from inventory using the *Internal Stock Use* window. A cost center is required in order to track and report the cost of the items used internally. Some examples of cost centers may include: expired products, laboratory supplies and treatment supplies.

Use this method versus invoicing a practice account, which negatively impacts your average invoice metrics.

In this demonstration, we will review or modify your cost center list.

1. Select **Inventory > Cost Center.**
2. Click **Add New** or **Edit**.
3. Complete the details in the *Cost Center Information* window.
4. Click **Save**.
5. Close the *Cost Center List* window.



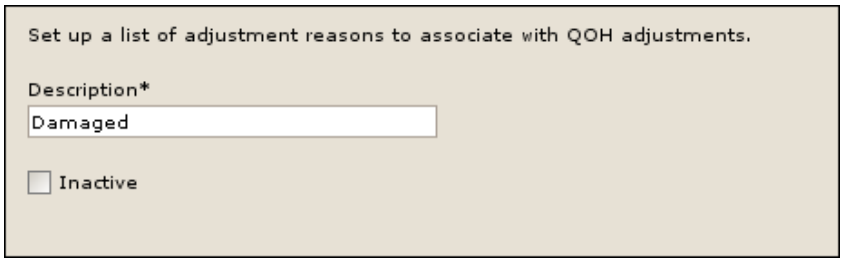
Set Up Adjustment Reasons

Adding an Adjustment Reason

Adjustment reasons are used to explain why a quantity on hand cost, expiration date or lot number adjustment was performed for an inventory item. This information can be tracked using the *Inventory – Adjustment Report*.

In this demonstration, we will review or modify your adjustment reasons.

1. Select **Inventory** > **Adjustment Reasons**. The *Adjustment Reasons List* displays all existing adjustment reasons.
2. Click **Add New** or **Edit**.
3. Complete the details in the *Adjustment Reasons Information* window.
4. Click **Save**.
5. Close the *Adjustment Reasons List* window.



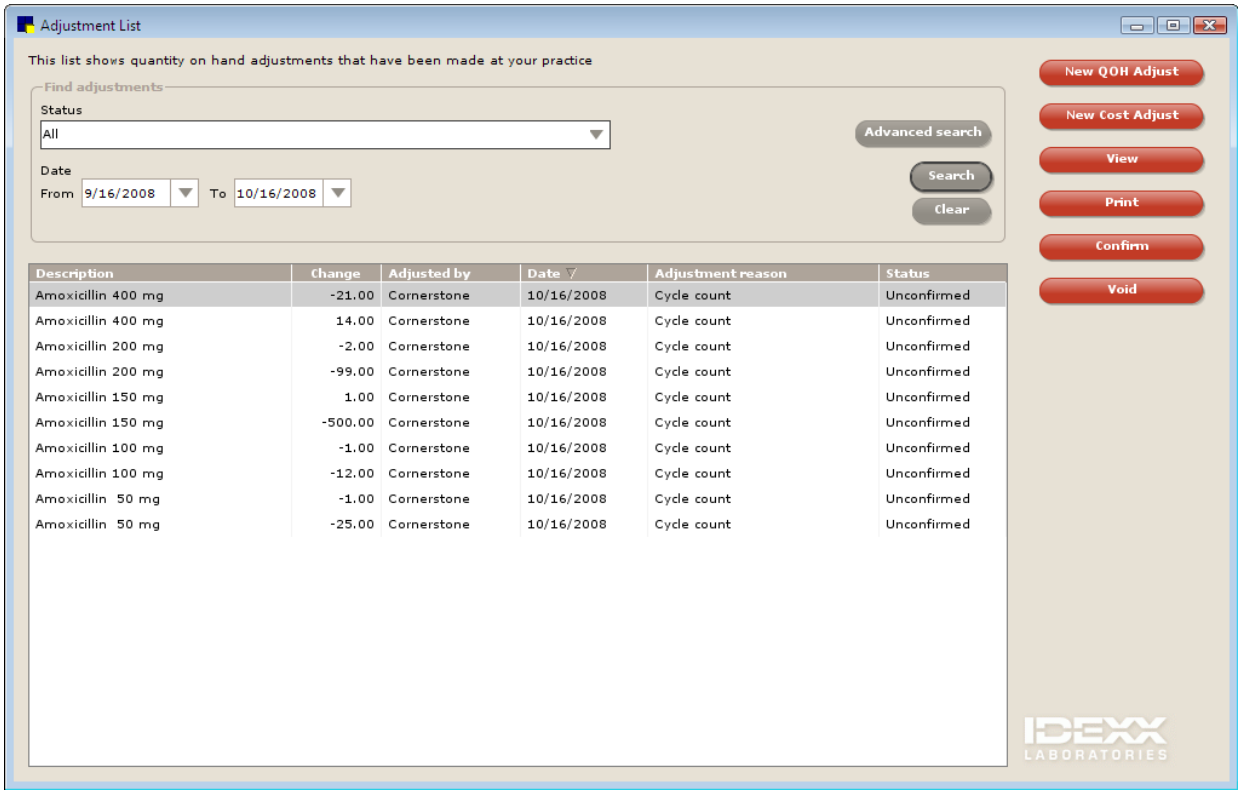
Adjustment List Overview

This lesson highlights the *Adjustment List*.

To open the *Adjustment List* window, select **Inventory** > **Adjustment List**. The *Adjustment List* displays all adjustments.

If practice defaults are not set to auto-confirm quantity on hand or expiration date adjustments, each adjustment performed by other staff members in the *View Quantity on Hand* window will display on the *Adjustment List* with an **Unconfirmed** status. Adjustments can be **Confirmed** or **Voided.**

While performing a basic or advanced search, to narrow the list of items, enter criteria in any of the fields in the *Find adjustments* area and click **Search**.


Adjustment List
This list shows quantity on hand adjustments that have been made at your practice
Find adjustments
Status
All
Date
From 9/16/2008
To 10/16/2008
Advanced search
Search
Clear
New QOH Adjust
New Cost Adjust
View
Print
Confirm
Void
Description Change Adjusted by Date Adjustment reason Status
Amoxicillin 400 mg -21.00 Cornerstone 10/16/2008 Cycle count Unconfirmed
Amoxicillin 400 mg 14.00 Cornerstone 10/16/2008 Cycle count Unconfirmed
Amoxicillin 200 mg -2.00 Cornerstone 10/16/2008 Cycle count Unconfirmed
Amoxicillin 200 mg -99.00 Cornerstone 10/16/2008 Cycle count Unconfirmed
Amoxicillin 150 mg 1.00 Cornerstone 10/16/2008 Cycle count Unconfirmed
Amoxicillin 150 mg -500.00 Cornerstone 10/16/2008 Cycle count Unconfirmed
Amoxicillin 100 mg -1.00 Cornerstone 10/16/2008 Cycle count Unconfirmed
Amoxicillin 100 mg -12.00 Cornerstone 10/16/2008 Cycle count Unconfirmed
Amoxicillin 50 mg -1.00 Cornerstone 10/16/2008 Cycle count Unconfirmed
Amoxicillin 50 mg -25.00 Cornerstone 10/16/2008 Cycle count Unconfirmed
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Phase 3: Invoice Item Information Changes - Mass and Single Changes

Single Changes - Maintain QOH

1. Select an inventory item from the invoice item list.
   1.1 Confirm the Sell UOM on the *Information* tab.
   1.2 Select the *Inventory* tab.
2. Fill in the following fields, if applicable:
   - Optional: *NDC/DIN Code*: Enter the **NDC** (National Drug Code) or **DIN** (Drug Identification Number), if applicable.
   - Optional: *Serial number*: Enter the Serial number for this item, if applicable.
   - Maintain QOH: To maintain quantity on hand for this item, select the **Maintain QOH** check box. If your practice is using Cornerstone Inventory, you may find it useful to maintain Quantity on Hand (QOH) for various items.

     When the quantity on hand check box is selected, other fields on this tab become active:

   - **Track expiration dates**; **Track lot numbers**; *Buy/sell ratio*; *Buy barcode*; *Stock at locations*; *Reorder information by location*.
   - Optional: **Track expiration date**: If you want to track expiration dates select the check boxes for *Track expiration dates*.

     Expiration dates can only be tracked if the QOH is being maintained for this item.

   - Optional: **Track lot numbers**: If you want to track lot numbers select the check boxes for *Track lot numbers.*

     Lot numbers can only be tracked if the QOH is being maintained for this item.

   - Buy/sell ratio: Fill in the *Buy/sell ratio*. If your purchase and selling unit of measures are different, select the *Buy UOM* and select the number of *Sell UOM* included in each Buy UOM. For this demonstration select the buy/sell ratio as **I box = 12 tubes**. Notes: The Sell UOM is set up in the *Information* tab. The UOM for Reorder Quantity will update to reflect the Buy UOM. The UOM for Reorder Point and overstock Point are listed with the Sell UOM.

     tip If items are bought in various quantities, for example an item is purchased in a bottle of 250 or 500 tables, set the buy/sell ratio to 1 tablet = 1 tablet.

   - Optional: Enter *Buy barcode*: You can enter a *Buy barcode* if the buy and sell numbers for the Buy/sell ratio are different. If the numbers are the same (ex. I box= I box; I tube = I dose) a *Buy barcode* cannot be listed. Barcodes are optional.
   - Stock at locations: Select (highlight) the locations where you will stock this item.

     Locations are unique to each practice and are set up at **Inventory > Locations.**

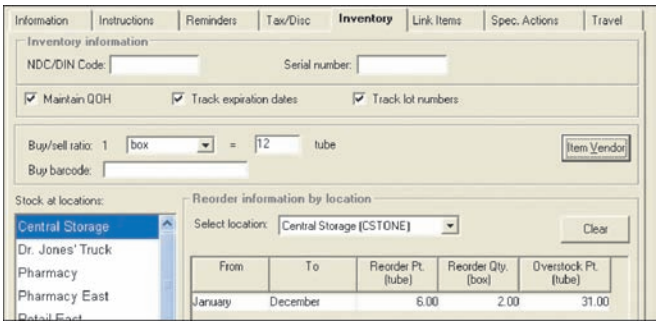
   - Vendor button: If applicable, select the **Item Vendor** button to enter the information regarding the vendors for this item on the *Item Vendor Information* window:
     - Vendor ID and Name; Designate if this is the *Primary vendor; Lead time* for product ordering and receipt; *Cost; Date; Vendor Item ID; Contact; Item Vendor Notes* (click the yellow note button)

3. Click **OK** to save the vendor information.

Vendors are set up at **Inventory > Vendors**.

The *Overstock Point* must be at least 1 greater than the number of vials in the *Reorder Point*, plus the number of vials ordered in the *Reorder Quantity*. Remember, you'll need to continue to list the reorder information for each of the locations highlighted on the *Stock at locations list*.

tip To determine the *Overstock Pt value*, add the *Reorder point plus* the *Reorder quantity*. Be sure to convert the *Reorder quantity* to individual units when adding. For example, if the *Reorder point* is 3 cans, and the *Reorder quantity* is 1 case (24 cans), then the *Overstock point* would be 28 (3 + 24 + 1).



4. In the *Link Items* tab, you can list any items, and the appropriate quantities, that will be removed from inventory as a result of the sale of this item.
5. In the *Travel* tab, you can select any travel sheets that this item should be listed on.
6. When the information regarding the setup of the inventory item is complete, click **OK** to save.

Single Changes - Special Buy/Sell Scenarios

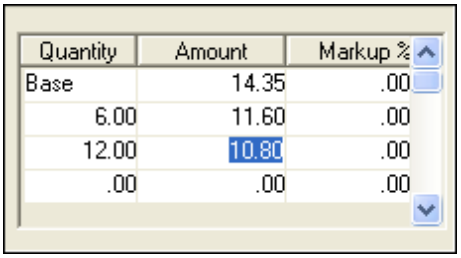
There are times when you may need to purchase different quantities of a product or want to sell the product in varying amounts. You will need to make a decision as to how best to set them up for inventory.

Example #1: Flea/tick or heartworm prevention

These products can be set up in two ways. The optimal method to set up this type of item is to sell it per dose. This will ensure the staff is always entering the number of doses the client is purchasing and inventory counts will remain correct.

Item	Buy/Sell Ration
Heartgard	1 carton = 60 dose
Heartgard	1 carton = 10 packages

If the buy/sell ratio is set as 1 carton = 60 doses, you may still sell the doses with quantity price breaks.



Example #2: Tablets that come in different sized bottles

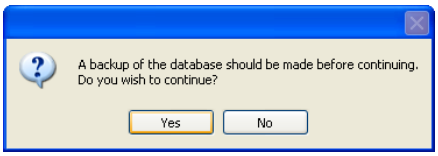
There are times when you may want to purchase products in varying quantities. You will need to determine which buy/sell ratio is the most appropriate to allow your staff to invoice the item as well as accounting for the inventory quantities efficiently. There are two scenarios that could apply:

Item	Buy/Sell Ration
Deramaxx 25mg	1 tablet = 1 tablet
Deramaxx 25mg	1 bottle = 90 tablets

Mass Changes

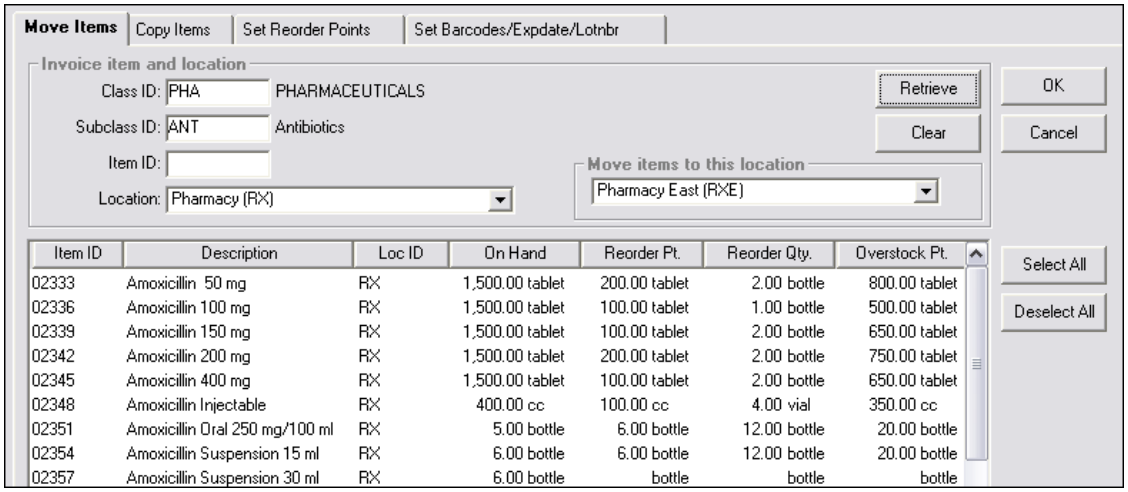
Moving Items

It is so important to make a backup prior to making changes that you'll be reminded to make one before making any changes.



This lesson highlights the *Move Items* tab of the *Inventory Setup* window. This tab allows the user to move reorder information and quantity on hand from one location to another. You will learn how to move an invoice item's reorder information and quantity on hand from one location to another.

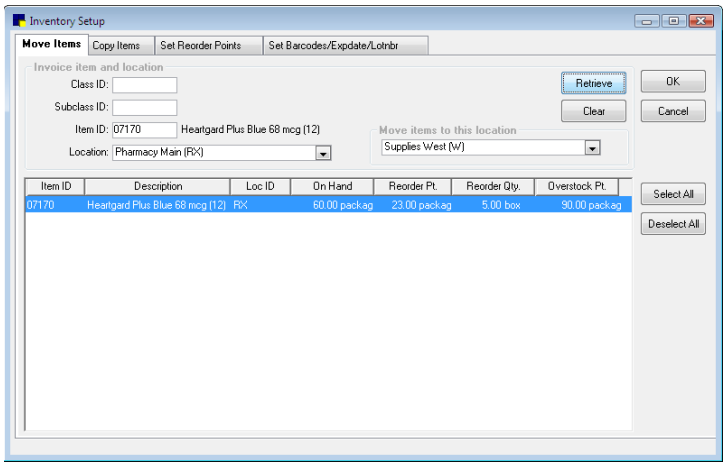
Access the *Move Items* tab by selecting **Tools > Inventory Setup >** *Move Items* tab.

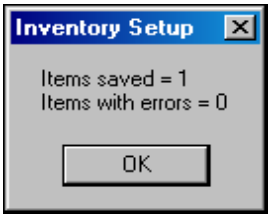

Move Items
Copy Items
Set Reorder Points
Set Barcodes/Expdate/Lotnbr
Invoice item and location
Class ID: PHA PHARMACEUTICALS
Subclass ID: ANT Antibiotics
Item ID:
Location: Pharmacy (RX)
Move items to this location
Pharmacy East (RXE)
Retrieve
Clear
OK
Cancel
Select All
Deselect All
Item ID | Description | Loc ID | On Hand | Reorder Pt. | Reorder Qty. | Overstock Pt.
02333 Amoxicillin 50 mg RX 1,500.00 tablet 200.00 tablet 2.00 bottle 800.00 tablet
02336 Amoxicillin 100 mg RX 1,500.00 tablet 100.00 tablet 1.00 bottle 500.00 tablet
02339 Amoxicillin 150 mg RX 1,500.00 tablet 100.00 tablet 2.00 bottle 650.00 tablet
02342 Amoxicillin 200 mg RX 1,500.00 tablet 200.00 tablet 2.00 bottle 750.00 tablet
02345 Amoxicillin 400 mg RX 1,500.00 tablet 100.00 tablet 2.00 bottle 650.00 tablet
02348 Amoxicillin Injectable RX 400.00 cc 100.00 cc 4.00 vial 350.00 cc
02351 Amoxicillin Oral 250 mg/100 ml RX 5.00 bottle 6.00 bottle 12.00 bottle 20.00 bottle
02354 Amoxicillin Suspension 15 ml RX 6.00 bottle 6.00 bottle 12.00 bottle 20.00 bottle
02357 Amoxicillin Suspension 30 ml RX 6.00 bottle bottle bottle bottle

Inventory items can be moved to active or inactive locations; however, inventory items can only be depleted from active locations.

In this demonstration, you will move the reorder information and quantity on hand for (07170) Heartgard® Plus Blue 68 mcg (12) from Pharmacy Main to Supplies West.

1. From Cornerstone, select **Tools** > **Inventory Setup** > *Move Items* tab.
2. Click **Yes** on the backup message window after making an appropriate backup. For demonstration purposes, assume a backup was made.
3. In the *Item ID* field enter **07170** for **Heartgard® Plus Blue 68 mcg (12)**.
4. In the *Location* list, select **Pharmacy Main (RX)**.
5. In the *Move items to this location* list, select **Supplies West (W)**.
6. Click **Retrieve**.
7. Click **OK**.
8. Click **OK** on the *Inventory Setup* pop-up window that shows **Items Saved = 1**.


Inventory Setup
Move Items
Copy Items
Set Reorder Points
Set Barcodes/Expdate/Lotnbr
Invoice item and location
Class ID:
Subclass ID:
Item ID: 07170 Heartgard Plus Blue 68 mcg (12)
Location: Pharmacy Main (RX)
Move items to this location
Supplies West (W)
Retrieve
Clear
OK
Cancel
Item ID | Description | Loc ID | On Hand | Reorder Pt. | Reorder Qty. | Overstock Pt.
07170 Heartgard Plus Blue 68 mcg (12) RX 60.00 pack.ag 23.00 pack.ag 5.00 box 90.00 pack.ag
Select All
Deselect All



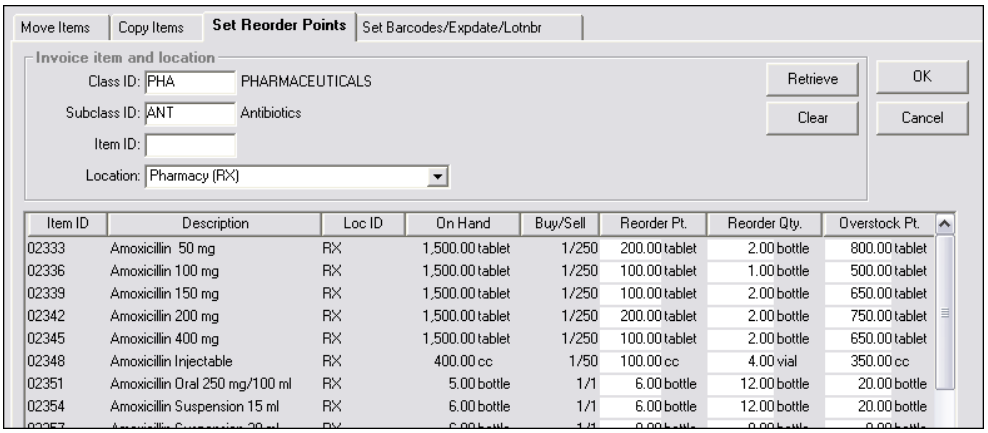
If the system encountered errors in the process of moving items, this window would indicate the number of errors and direct you to the *Inventory - Setup Error Report*.

This icon indicates where a barcode scanner could be utilized to improve efficiency in entering Item IDs.

Setting Reorder Points

This lesson highlights the *Set Reorder Points* tab of the *Inventory Setup* window. This tab allows the user to set reorder points for multiple items at one time. You will learn how to set multiple reorder points for a location.

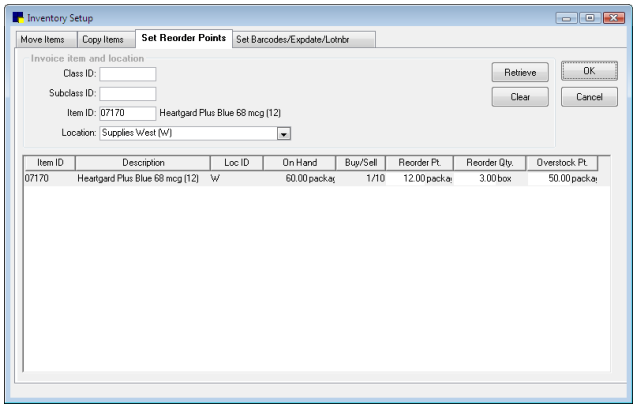
Access the *Set Reorder Points* tab by selecting **Tools > Inventory Setup >** *Set Reorder Points* tab.


Move Items
Copy Items
Set Reorder Points
Set Barcodes/Expdate/Lotnbr
Invoice item and location
Class ID: PHA PHARMACEUTICALS
Subclass ID: ANT Antibiotics
Item ID:
Location: Pharmacy (RX)
Retrieve
Clear
OK
Cancel
Item ID | Description | Loc ID | On Hand | Buy/Sell | Reorder Pt. | Reorder Qty. | Overstock Pt.
02333 | Amoxicillin 50 mg | RX | 1,500.00 tablet | 1/250 | 200.00 tablet | 2.00 bottle | 800.00 tablet
02336 | Amoxicillin 100 mg | RX | 1,500.00 tablet | 1/250 | 100.00 tablet | 1.00 bottle | 500.00 tablet
02339 | Amoxicillin 150 mg | RX | 1,500.00 tablet | 1/250 | 100.00 tablet | 2.00 bottle | 650.00 tablet
02342 | Amoxicillin 200 mg | RX | 1,500.00 tablet | 1/250 | 200.00 tablet | 2.00 bottle | 750.00 tablet
02345 | Amoxicillin 400 mg | RX | 1,500.00 tablet | 1/250 | 100.00 tablet | 2.00 bottle | 650.00 tablet
02348 | Amoxicillin Injectable | RX | 400.00 cc | 1/50 | 100.00 cc | 4.00 vial | 350.00 cc
02351 | Amoxicillin Oral 250 mg/100 ml | RX | 5.00 bottle | 1/1 | 6.00 bottle | 12.00 bottle | 20.00 bottle
02354 | Amoxicillin Suspension 15 ml | RX | 6.00 bottle | 1/1 | 6.00 bottle | 12.00 bottle | 20.00 bottle

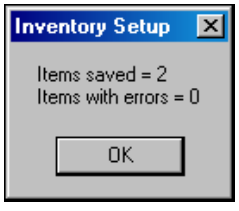
In this demonstration, you will change the reorder point, reorder quantity and overstock point for (07170) Heartgard® Plus Blue 68 mcg (12).

1. Select **Tools > Inventory Setup >** click **Yes** at the Backup Warning > *Set Reorder Points* tab.
2. In the *Item ID* field enter **07170** for Heartgard® Plus Blue 68 mcg (12).
3. In the *Location* list, select **Supplies West (W)**.
4. Click **Retrieve**.
5. For Heartgard® Plus Blue 68 mcg (12) (07170) set the reorder point to **12 packages**, the reorder quantity to **3 boxes**, and the overstock point to **50 packages** for all locations listed and press **Tab**.

If the overstock point is less than the reorder point plus the value of the reorder quantity, you will receive a message. Change the numbers and quantities appropriately and continue.


Inventory Setup
Move Items
Copy Items
Set Reorder Points
Set Barcodes/Expdate/Lotnbr
Invoice item and location
Class ID:
Subclass ID:
Item ID: 07170 Heartgard Plus Blue 68 mcg (12)
Location: Supplies West (W)
Retrieve
Clear
OK
Cancel
Item ID | Description | Loc ID | On Hand | Buy/Sell | Reorder Pt. | Reorder Qty. | Overstock Pt.
07170 | Heartgard Plus Blue 68 mcg (12) | W | 60.00 packa | 1/10 | 12.00 packa | 3.00 box | 50.00 packa

6. Click **OK**.
7. Click **OK** on the *Inventory Setup* pop-up window that show **Items Saved = 1**.



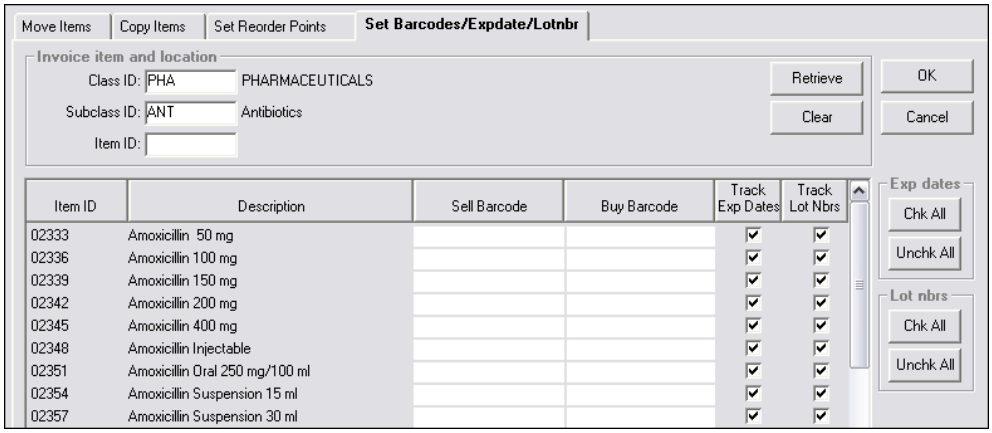
If the system encountered errors in the process of moving items, this window would indicate the number of errors and direct you to the *Inventory - Setup Error Report*.

tip After QOH tracking and buy/sell ratios are set up for an inventory item, use the Inventory set up tool to set reorder points and expiration date and lot number tracking.

Setting Barcodes, Expiration Dates and Lot Numbers

This lesson highlights the *Set Barcodes, Expiration Dates and Lot Numbers* tab of the *Inventory Setup* window. This tab allows the user to set buy and sell barcodes as well as set invoice items to track expiration dates and lot numbers. You will learn how to set barcodes, expiration dates and lot numbers for a specific location.

Access the *Set Barcodes, Expiration Dates and Lot Numbers* tab by selecting **Tools > Inventory Setup >** *Set Barcodes/ Expdate/Lotnbr* tab.

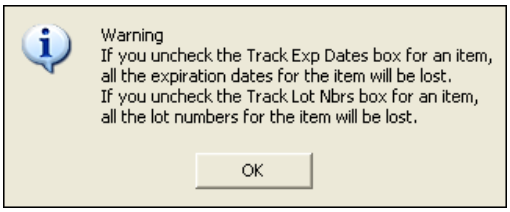


- When QOH tracking and buy/sell rations are set up for individual inventory items, use the Inventory Setup tool (from the Tools menu) to set reorder points and expiration date and lot number tracking.
- When turning on expiration date or lot number tracking for first time, and existing QOH are already listed it is advisable to immediately update the current QOH with expiration date and lot number information. (Update from the *View Quantity on Hand* window.
- It is important that your staff knows how to correctly complete the task of inventory verification if the expiration date and/or lot number do not readily appear. This is done by double-clicking in the location or lot number field of inventory details window.
- The **Expiration Date** check box must be selected for items for which you will track expiration dates. To update a single item's expiration date checkbox, go to **Lists** > **Invoice Item** > *Inventory* tab.
- To update multiple item expiration dates, go to **Tools** > **Inventory Setup** > *Set Barcode/Expdate/Lotnbr* tab.
    - Initially when one or more items have been marked to track expiration dates, a message will display asking if you want your existing expiration dates copied into inventory where dates are available.
    - If expiration dates have been changed on any of the invoice items prior to entering Tools, those invoice item expiration dates will remain unchanged.

In this demonstration, you will add a buy and sell barcode for (07170) Heartgard® Plus Blue 68 mcg (12).

You would make an appropriate backup before continuing.

1. Select **Tools > Inventory Setup >** click **Yes** at the Backup Warning > *Set Barcodes, Expiration Dates and Lot Numbers* tab.
2. A window will display a warning message: If you deselect the **Track Exp Dates** check box for an item, all the expiration dates for the item will be lost. If you deselect the **Track Lot Nbrs** check box for an item, all the lot numbers for the item will be lost. Read the warning message and click **OK**.


Warning
If you uncheck the Track Exp Dates box for an item, all the expiration dates for the item will be lost.
If you uncheck the Track Lot Nbrs box for an item, all the lot numbers for the item will be lost.
OK

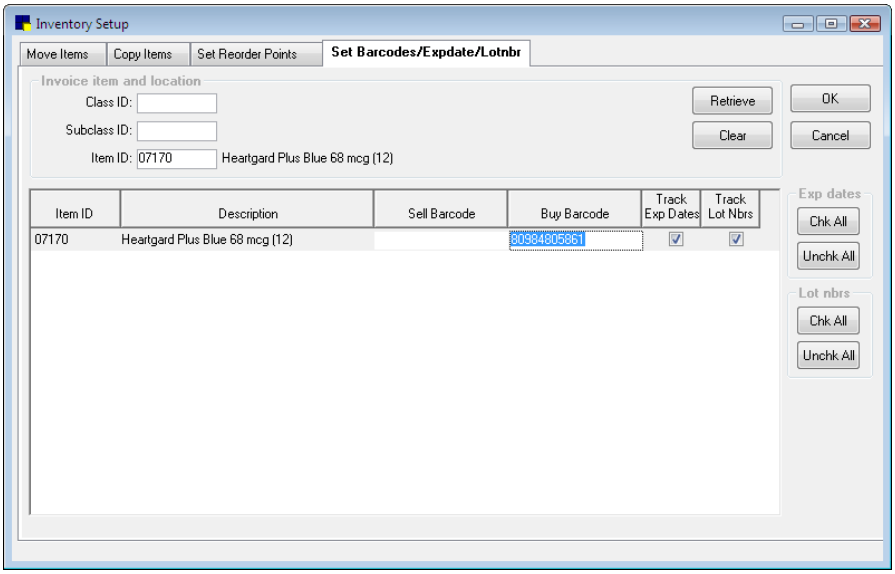
3. In the *Item ID* field enter **07170** for Heartgard® Plus Blue 68 mcg (12).

4. Click **Retrieve**.
5. In the *Buy Barcode* field, use your barcode reader to scan and enter the number. If you do not have a barcode reader, manually enter this number: **80984805861**.

For information about barcode readers, which can automatically scan and enter these barcodes for you, please contact the IDEXX Computer Systems at 1-800-283-8386.

6. Click **OK**.
7. Click **OK** on the *Inventory Setup* pop-up window that show **Items Saved = 1**.

If the system encountered errors in the process of moving items, this window would indicate the number of errors and direct you to the *Inventory - Setup Error Report*.



Phase 4: Invoice Item Counts and Costs, Then Defaults

Checklist - Invoice Item Counts and Costs

These instructions are designed to assist you in the inventory clean up procedure.

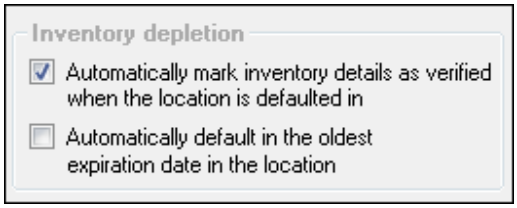
Task	Details
1. Review the *Invoice Item Setup Report*.	• Are there items that you no longer sell or should be inactivated. • Are there items that are in the wrong classification?
2. Choose a class to begin working on (ex: Food or Nutritional) and complete setup on each item in this class.	• *Information* tab: Set the correct selling unit of measure and pricing information. Be sure to include price breaks, as needed. • *Inventory* tab: Select the Maintain QOH, Location and set reorder information (reorder point, reorder quantity, overstock point). Select Track Expiration Dates and Track Lot Numbers, as needed.
3. Receive any vendor invoices that have not been entered in Cornerstone.	• Enter receipts to ensure cost history is up-to-date prior to adjusting. This will ensure quantities will not be incorrect again after adjustments are made.
4. Print the *Inventory – Counts Report* for the class of items you setup.	• Use this report to do a physical count of your inventory items.
5. Using the count totals written on the *Inventory-Counts Report*, adjust your quantity on hand.	• Make adjustments using the *View Quantity on Hand* or *Adjustment List* windows. You will want to adjust immediately after counting and befoe any other invoicing is completed.
6. Review the cost on hand of the inventory items adjusted. Adjust the average cost of each inventory item, as needed.	• View the inventory cost on hand in the *View Quantity on Hand* window. • Complete cost adjustments in the *Adjustment List*.
7. Repeat - beginning at step #2 for another class.	Begin by working on the item classes that have the most activity.

Practice Defaults

Setting the Inventory Depletion Default

The location be automatically selected if there is only one location available. You can also select an option to default in the oldest expiration date in each location during depletion, but this is not recommended unless you are very strict about using a First-In First-Out (FIFO) consumption method.

In these cases, the system can be set to automatically choose a location and mark an item as verified when depleting inventory.


Inventory depletion
Automatically mark inventory details as verified when the location is defaulted in
Automatically default in the oldest expiration date in the location

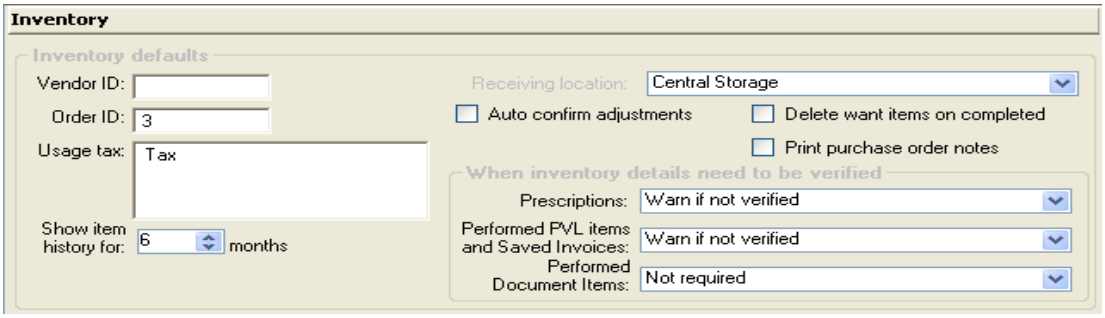
If you choose to use this default, you may still need to verify the depletion if you are tracking lot numbers and/or expiration dates for the invoice item. This default selection may primarily be used in clinics where only one location is used, only a few lot numbers and/or expiration dates are tracked or no lot numbers and/or expiration dates are tracked.

Setting the Inventory Defaults

On the *Invoice Item* tab there is a section for setting Inventory defaults. This section includes:

- *Vendor ID* field: The ID will automatically appear as the primary vendor in the *Item Vendor Information* window when setting up inventory information on invoice items.
- *Order ID* field: Enter a beginning number used to track purchase orders in Inventory. This is the number to begin numbering new purchase orders.
- *Usage Tax* list box: Select the tax(es) that apply to items used internally by the practice if applicable.

  If the usage tax does not display on the list, set the tax up in Cornerstone Foundation in **Controls > Taxes**.


Inventory
Inventory defaults
Vendor ID:
Order ID: 3
Usage tax: Tax
Show item history for: 6 months
Receiving location: Central Storage
Auto confirm adjustments
Delete want items on completed
Print purchase order notes
When inventory details need to be verified
Prescriptions: Warn if not verified
Performed PVL items and Saved Invoices: Warn if not verified
Performed Document Items: Not required

There are also options for:

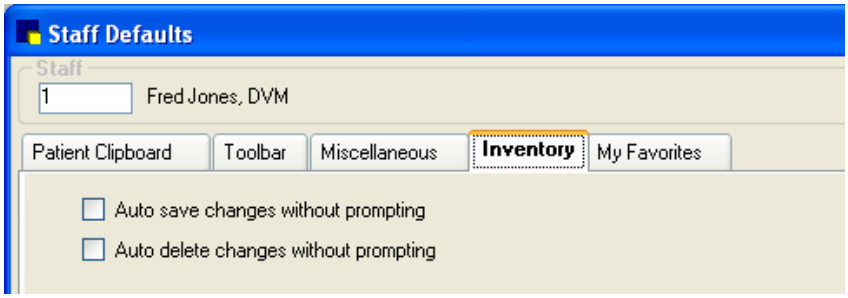
- Show item history for _____ months
- Delete Want List items on completed
- Print purchase order notes

When inventory details need to be verified for items tracking lot numbers and expiration dates:

- *Prescriptions* field: The default selection is **Not required**. Other options include: **Warn if not verified** and **Required**.
  - **Not required**: You will not be required to enter lot numbers and expiration dates on the *Prescription* window.
  - **Warn if not verified**: A warning will appear if lot numbers and expiration dates are not entered giving you the option on the *Prescription* window.
  - **Required**: You will be required to enter lot numbers and expiration dates on the *Prescription* window.
- *Performed PVL items and Saved Invoices* field: The default selection is **Warn if not verified**. Other options include: **Not required** and **Required**.
  - **Not required**: You will not be required to enter lot numbers and expiration dates on the PVL or saved invoices.
  - **Warn if not verified**: A warning will appear if lot numbers and expiration dates are not entered giving you the option to enter lot numbers and expiration dates on the PVL or saved invoices.
  - **Required**: You will be required to enter lot numbers and expiration dates on the PVL or saved invoices.
- *Performed Document Items* field: The default selection is **Not Required**. Other options include: **Warn if not verified** and **Required**.
  - **Not required**: Does not require inventory details to be verified at the time that the invoice items are sent from the document to the PVL. (The inventory details would still need to be verified later on the PVL or invoice.)
  - **Warn if not verified**: Displays a warning if inventory details are not filled in and verified at the time that the invoice items are sent from the document to the PVL. (The inventory details would still need to be verified later on the PVL or invoice.)

Staff Inventory Defaults

In this demonstration we will review the default inventory's save and deplete preferences depletion location for the staff member logged in.



1. From the Cornerstone menu bar, select **Controls > Defaults > Staff**.
2. In the Staff field, select the appropriate staff ID; press **Tab**.
3. Select the *Inventory* tab.
4. To auto save changes without prompting for this staff member select the **Auto save changes without prompting** check box. For this demonstration, select the check box.
5. To auto delete changes without prompting for this staff member, select the **Auto delete changes without prompting** check box. For this demonstration, select the check box.
6. Click **Save** to save the settings.
7. Click **OK** to exit *Staff Defaults*.

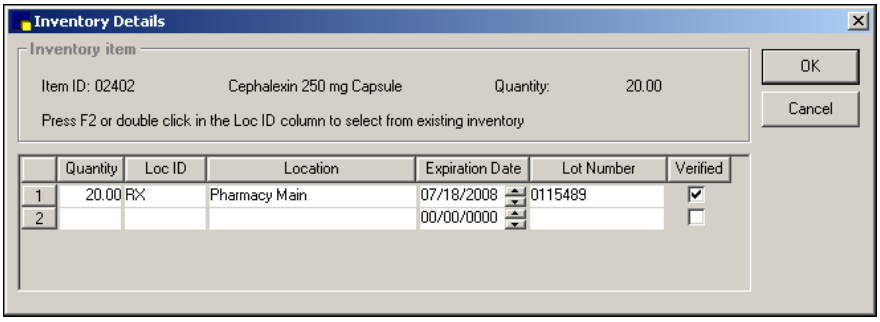
Go Live. Communication and Training. Adjustment Report.

Communication and Decision-Making

Communicating the implementation of the new inventory process to your staff and careful decision making in the inventory setup process will be important for your success in implementing Cornerstone* Inventory. View the *Sample Inventory Communication Plan* on the next page.

Depending on how you use the features in inventory, it may impact how you use Cornerstone* Foundation. If you plan to track lot numbers and expiration dates, you will be required to enter those prior to, or during*, the invoice process. It is important to have a plan in place for communicating these lot numbers and/or expiration dates to the staff responsible for prescription labels and entering the charges on the Patient Visit List or invoice.

*If expiration dates and lot numbers are manually entered during invoicing, negative quantities on hand for the lot number that was manually entered and will have to be manually adjusted. Therefore, manually entering QOH is not recommended.



To learn more about how inventory affects your use of Cornerstone*, please refer to the *Self-Paced Release Training* or the *What's New in Cornerstone* 8.1* document. As you progress through this Self-Paced Inventory Training, think about how you are going to set up inventory to work best for your practice.

Sample Inventory Communication Plan

An ***Inventory Communication Plan*** is a beneficial tool for staff members. Any employee who receives or uses tracked inventory will need to be prepared to enter inventory details (tracking information). The following sample memo may be used to communicate changes to your staff.

Memo

Date: Fall 2010

To: Practice Staff

From: Practice Management Team

RE: New IDEXX Cornerstone* 8.1 Inventory Features

Dear Staff,

Memo Purpose
You will soon experience a new improved look, feel, and functionality in Cornerstone related to inventory tracking. We want to prepare you for this, communicate the benefits, and provide you with action to take that will be necessary in order to achieve this new level of performance.

Benefits
The benefits to our practice are multi-fold. When inventory tracking is used for an invoice item, it could mean:

- Inventory in locations can be monitored and we'll be alerted when a certain location is low
- If a product is recalled by the vendor, we'll be able to identify which clients were sold an invoice item with a specific lot number or expiration date in order to take proper action

Your Action
We need your help to make this happen. Please take action in the following ways:

- Complete the training when prompted
- When entering inventory information, either during purchasing or providing patient care, ensure the inventory information is entered accurately
- Encourage and support others as they utilize inventory-related Cornerstone* features
- Consider operational changes that we may need to make and bring to management's attention so proper procedures can be adjusted

Our Actions Together
Together, we will review performance and make necessary adjustments to meet our patient care needs.

Sincerely,

Practice Management Team

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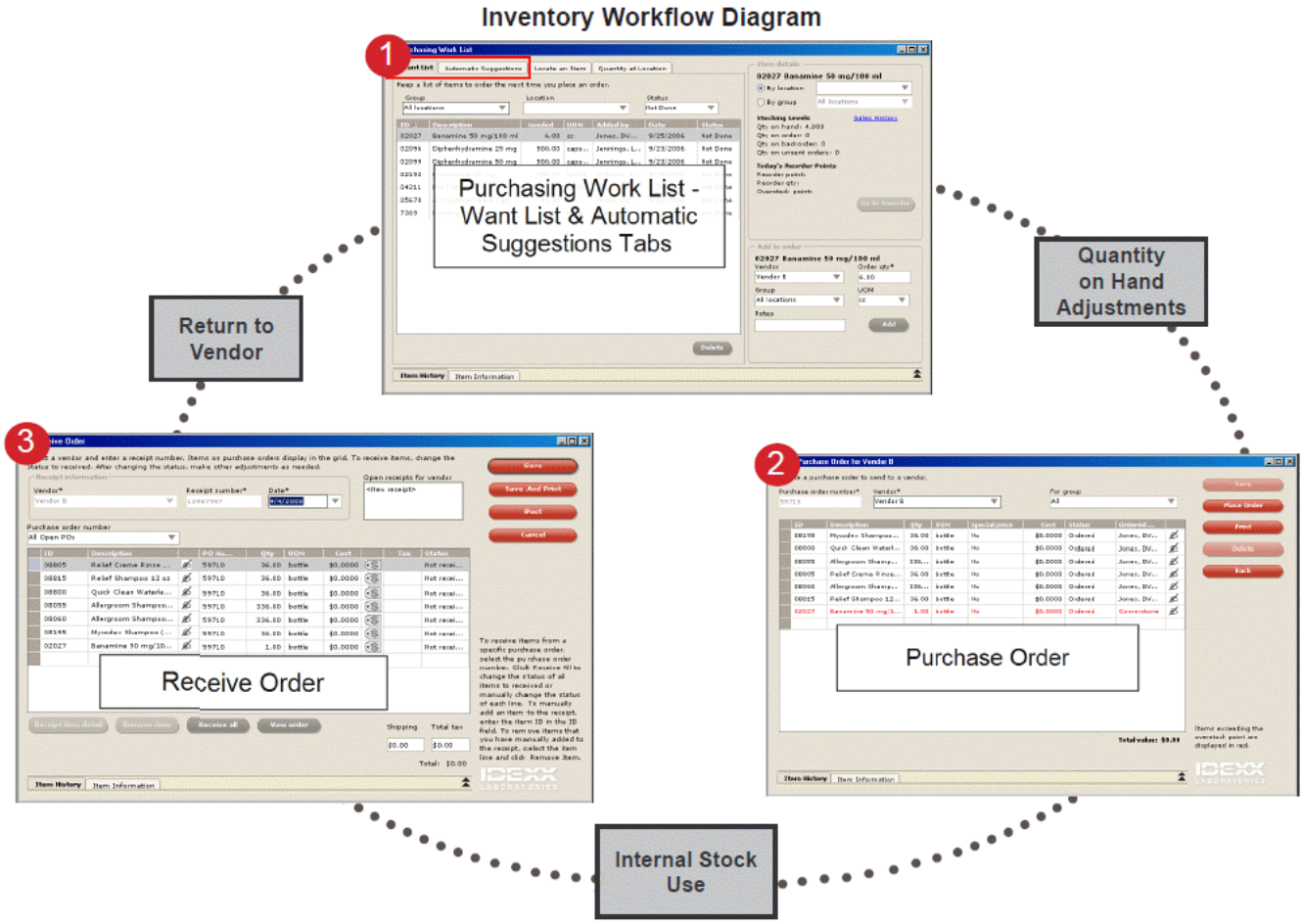
Phase 5: Deplete/Adjust/Move

1. Purchasing Work List
2. Purchase Order
3. Receive Order
4. Return to Vendor
5. Deplete
    - Adjustments
    - Internal Stock Use
    - Performed PVL or Document Items



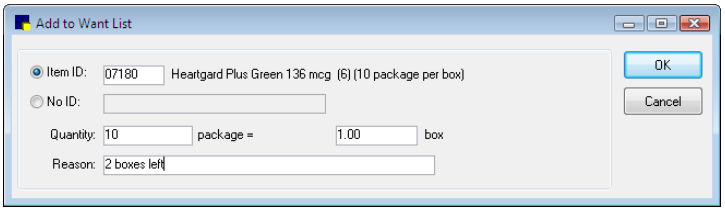
Section 3

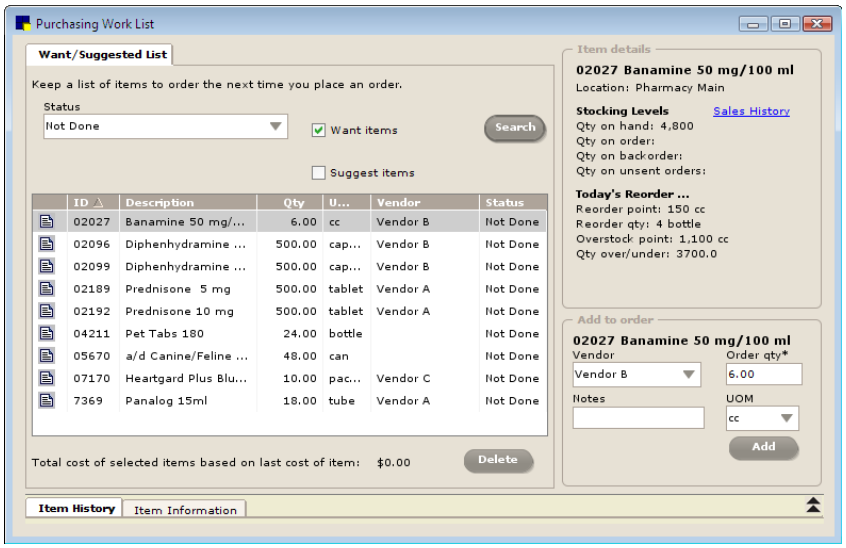
Purchase

Adding Items to the Want List

In this demonstration, we will add an item to the *Want List.*

1. Select the **Want List** toolbar button.
2. Enter the *Item ID* or select the 'No ID' option and type a description.
3. Enter the *Quantity* requested.
4. In the *Reason* field, enter a reason if appropriate. Enter **For Training Purposes**.
5. Click **OK**.
6. Repeat steps 2-5 and add another item to the **Want List**.
7. Click **Cancel** to close the window.


Add to Want List
Item ID: 07180 Heartgard Plus Green 136 mcg (6) (10 package per box)
No ID:
Quantity: 10 package = 1.00 box
Reason: 2 boxes left
OK
Cancel



tip If you have appropriate security, you can view the list of items that users have placed on the *Want List* by selecting **Inventory** > **Purchasing Work List**, and the *Want List Report* by selecting **Reports** > **Inventory** > **Want List Report**.

Items without an ID code can be added to the *Want List*.

If an Item ID is added more then once to the *Want List*, the list expands and shows who added it, how much and when it was added.

Details added into the Reason field will appear on the *Purchase Order.*

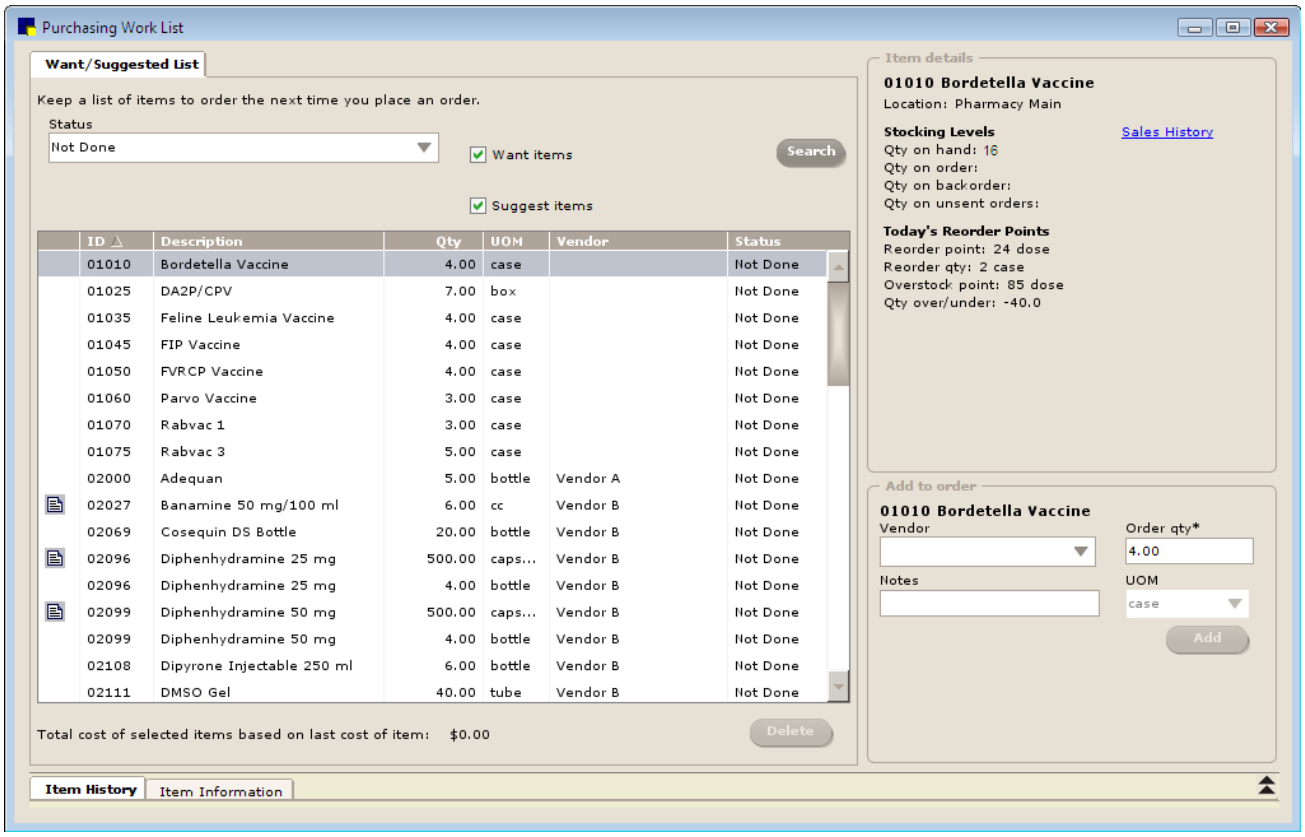
Want/Suggested List Overview

The *Want/Suggested List* is used to display items that have been requested by employees and items that are below the reorder point. Items can be deleted from the *Purchasing Work List* on the *Want/Suggested List*.

When looking for specific items in the *Want/Suggested List* on the *Purchasing Work List*, select an option from one of the available criteria lists. Items requested that match the criteria will display.

Want List fields include:

- *Status* list: Select a status to view items with the specified status only. Options include **Not Done** or **Complete**.
- **Want items** check box: Select this option to include want list items.
- **Suggested items** check box: Select this option to view items that are at or below the reorder points set up by the practice. Reorder points are set up on individual item records (**Lists > Invoice Item >** Select the Item **>** Select **Update > *Inventory* tab)**.

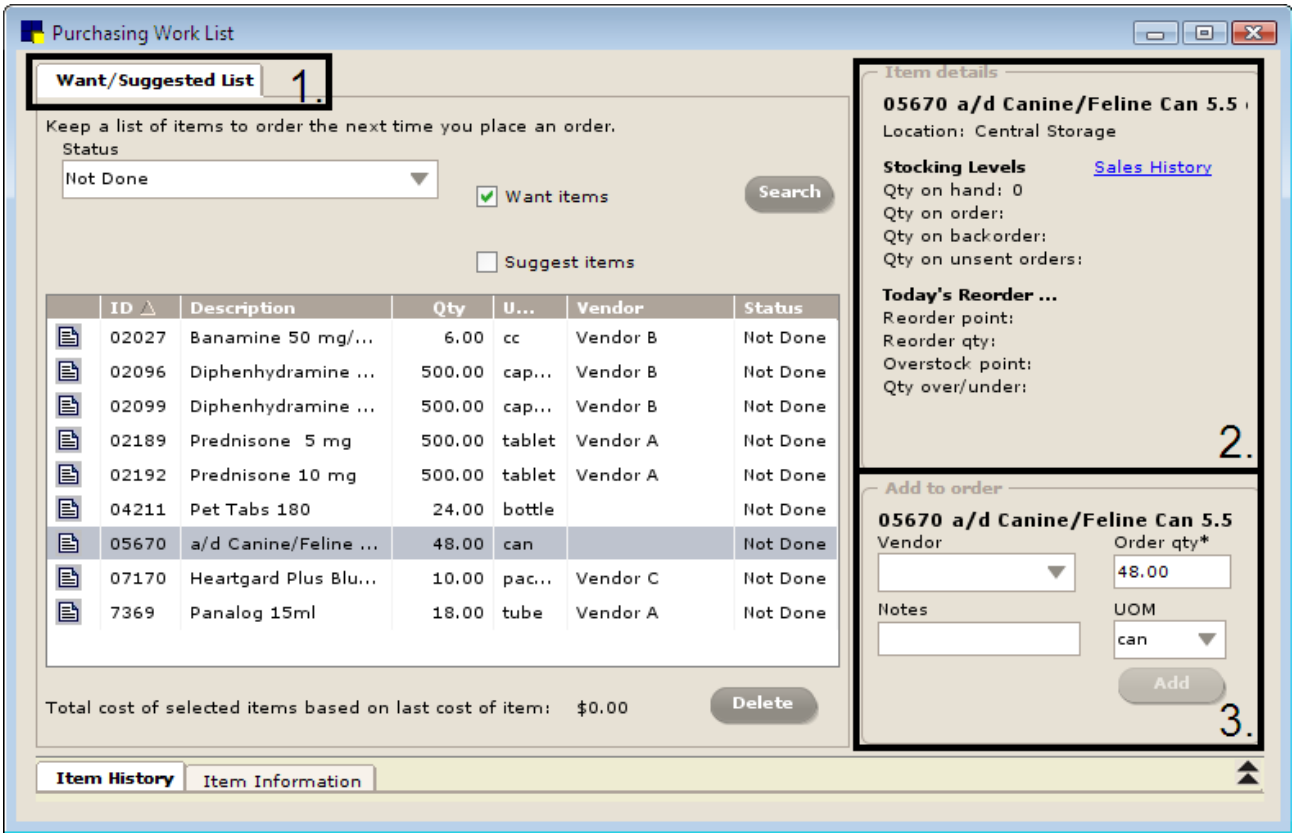

Purchasing Work List
Want/Suggested List
Keep a list of items to order the next time you place an order.
Status
Not Done
Want items
Suggest items
Search
ID
Description
Qty
UOM
Vendor
Status
01010 Bordetella Vaccine 4.00 case Not Done
01025 DA2P/CPV 7.00 box Not Done
01035 Feline Leukemia Vaccine 4.00 case Not Done
01045 FIP Vaccine 4.00 case Not Done
01050 FVRCP Vaccine 4.00 case Not Done
01060 Parvo Vaccine 3.00 case Not Done
01070 Rabvac 1 3.00 case Not Done
01075 Rabvac 3 5.00 case Not Done
02000 Adequan 5.00 bottle Vendor A Not Done
02027 Banamine 50 mg/100 ml 6.00 cc Vendor B Not Done
02069 Cosequin DS Bottle 20.00 bottle Vendor B Not Done
02096 Diphenhydramine 25 mg 500.00 caps... Vendor B Not Done
02096 Diphenhydramine 25 mg 4.00 bottle Vendor B Not Done
02099 Diphenhydramine 50 mg 500.00 caps... Vendor B Not Done
02099 Diphenhydramine 50 mg 4.00 bottle Vendor B Not Done
02108 Dipyrone Injectable 250 ml 6.00 bottle Vendor B Not Done
02111 DMSO Gel 40.00 tube Vendor B Not Done
Total cost of selected items based on last cost of item: $0.00
Delete
Item details
01010 Bordetella Vaccine
Location: Pharmacy Main
Stocking Levels
Sales History
Qty on hand: 16
Qty on order:
Qty on backorder:
Qty on unsent orders:
Today's Reorder Points
Reorder point: 24 dose
Reorder qty: 2 case
Overstock point: 85 dose
Qty over/under: -40.0
Add to order
01010 Bordetella Vaccine
Vendor
Order qty*
4.00
Notes
UOM
case
Add
Item History
Item Information

Purchasing Work List

This lesson highlights the *Purchasing Work List*.

Open the window by selecting **Inventory > Purchasing Work List**. The *Purchasing Work List* displays the *Want/Suggested List*.

1. The *Purchasing Work List* is used to view items requested by staff or suggested by the system.
   - The *Purchasing Work List*'s *Want/Suggested List* can be used to view:
     - Items requested by staff.
     - Items suggested by Cornerstone.



2. The *Item details* area displays general information for an item.
3. The *Add to Order* area is used to add one or more items to a Purchase Order.

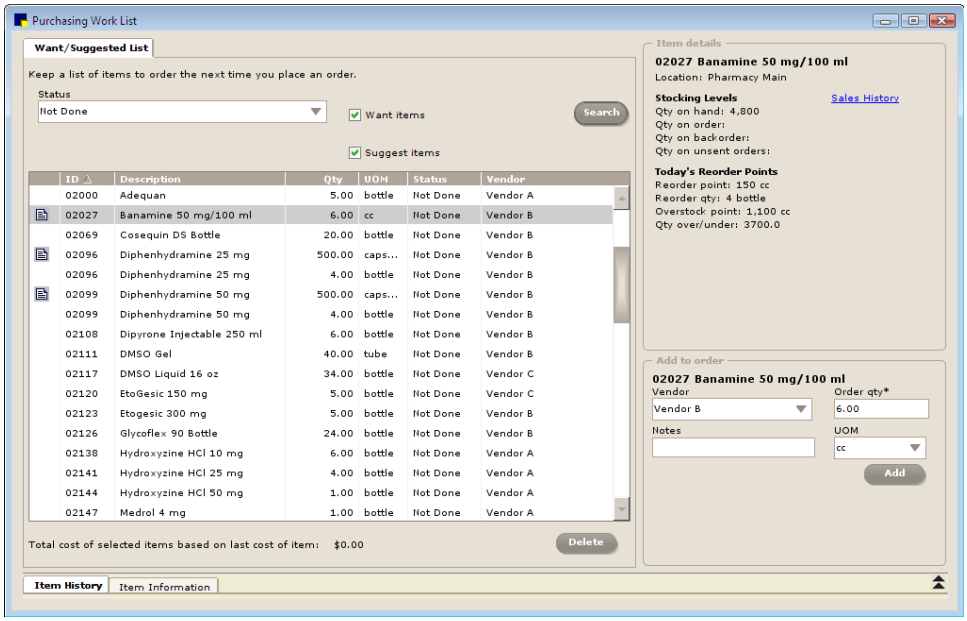
Arrange Columns

In this demonstration, you will arrange a list of items in the *Purchasing Work List* by description and then add an additional column to view the vendor for each product.

1. Select **Inventory > Purchasing Work List**.
2. The *Want/Suggested List* displays. Click **Search**.
3. Click the *Description* column header. The items are sorted by description in ascending order.
4. Click the *Description* column header again. The items are sorted by description in descending order.
5. Right click the *Description* column header and a list of potential columns displays.
6. Click **Vendor**. The selection will remove Vendor as a column. This will prevent a user from viewing the primary vendor for an item. Reselect the **Vendor** option so you can view Vendors in the list.

These selections are based on user log-in. Once a selection is made by a user it will remain in that user's preferences.

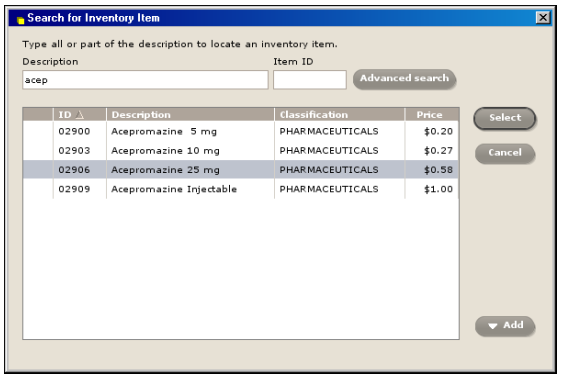
Inventory windows can be sorted by clicking on any of the column headers.


Purchasing Work List
Want/Suggested List
Keep a list of items to order the next time you place an order.
Status
Not Done
Want items
Suggest items
Search
ID
Description
Qty
UOM
Status
Vendor
02000 Adequan 5.00 bottle Not Done Vendor A
02027 Banamine 50 mg/100 ml 6.00 cc Not Done Vendor B
02069 Cosequin DS Bottle 20.00 bottle Not Done Vendor B
02096 Diphenhydramine 25 mg 500.00 caps... Not Done Vendor B
02096 Diphenhydramine 25 mg 4.00 bottle Not Done Vendor B
02099 Diphenhydramine 50 mg 500.00 caps... Not Done Vendor B
02099 Diphenhydramine 50 mg 4.00 bottle Not Done Vendor B
02108 Dipyrone Injectable 250 ml 6.00 bottle Not Done Vendor B
02111 DMSO Gel 40.00 tube Not Done Vendor B
02117 DMSO Liquid 16 oz 34.00 bottle Not Done Vendor C
02120 EtoGesic 150 mg 5.00 bottle Not Done Vendor C
02123 Etogesic 300 mg 5.00 bottle Not Done Vendor B
02126 Glycoflex 90 Bottle 24.00 bottle Not Done Vendor B
02138 Hydroxyzine HCl 10 mg 6.00 bottle Not Done Vendor A
02141 Hydroxyzine HCl 25 mg 4.00 bottle Not Done Vendor A
02144 Hydroxyzine HCl 50 mg 1.00 bottle Not Done Vendor A
02147 Medrol 4 mg 1.00 bottle Not Done Vendor A
Total cost of selected items based on last cost of item: $0.00
Delete
Item details
02027 Banamine 50 mg/100 ml
Location: Pharmacy Main
Stocking Levels
Sales History
Qty on hand: 4,800
Qty on order:
Qty on backorder:
Qty on unsent orders:
Today's Reorder Points
Reorder point: 150 cc
Reorder qty: 4 bottle
Overstock point: 1,100 cc
Qty over/under: 3700.0
Add to order
02027 Banamine 50 mg/100 ml
Vendor
Vendor B
Order qty*
6.00
Notes
UOM
cc
Add
Item History
Item Information

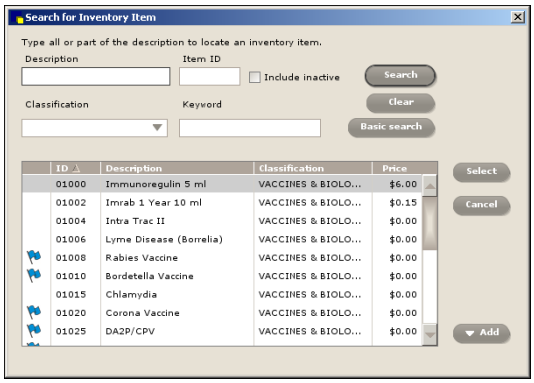
Inventory Item Search Overview

This lesson introduces the *Search for Inventory Item* window, which is used in Cornerstone Inventory to search for and select items.

In order to access this window, press **F2** or double click in one of the searchable item fields located throughout Inventory or click the magnifying glass icon located next to the Item field.



Basic Search for Inventory Item window



Advanced Search for Inventory Item window

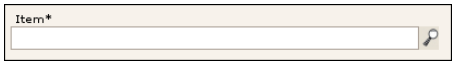
If a flag icon displays next to an item, the item is marked to Maintain QOH.

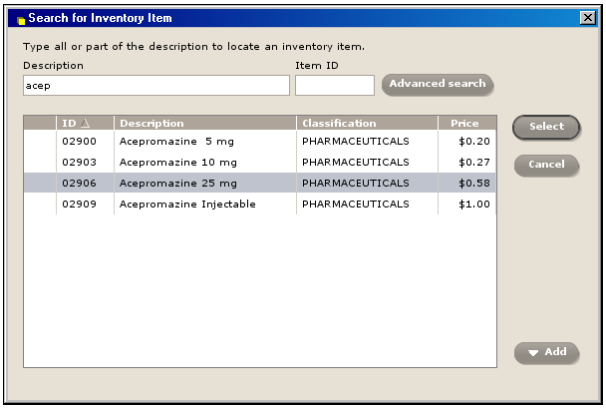
Basic Search for an Inventory Item

In this demonstration, you will perform a search for Acepromazine from the *View Quantity on Hand* window.

1. Select **Inventory** > **View Quantity on Hand**.
2. Press **F2** in the *Item* field.
3. Type: **acep** in the *Description* field.

   Any inventory items that match the search criteria display in the list.
4. Click on one of your **Acepromazine** items.
5. Click **Select** and the item displays in the *Item* field on the *View Quantity on Hand* window.
6. Close all open windows.





Advanced Search for an Inventory Item

In this demonstration, you will perform an advanced search for IV Catheters from the *View Quantity on Hand* window.

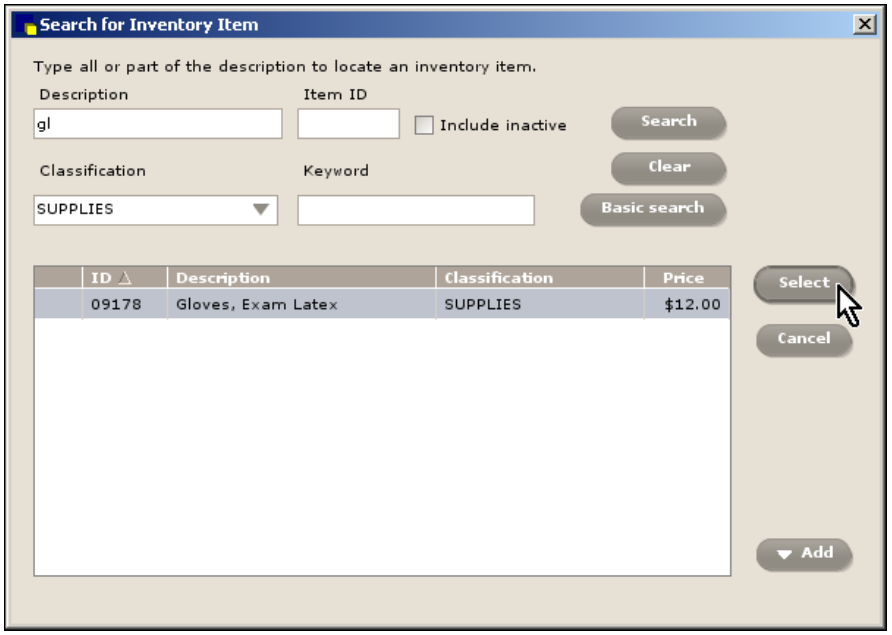
1. Select **Inventory > View Quantity on Hand**.
2. Press **F2** in the *Item* field.

   The *Search for Inventory Item* window displays.

3. Click **Advanced search**.
4. Type **cat** in the *Description* field.
5. Click **Search** and the inventory items that match the above criteria display.

   tip Click **Clear** to remove the current search criteria and begin a new search.

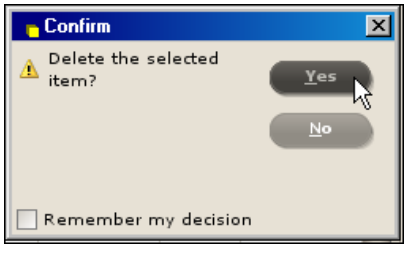
6. Click to select a catheter.
7. Click **Select** and the item displays in the *Item* field on the *View Quantity on Hand* window.
8. Close all open windows.



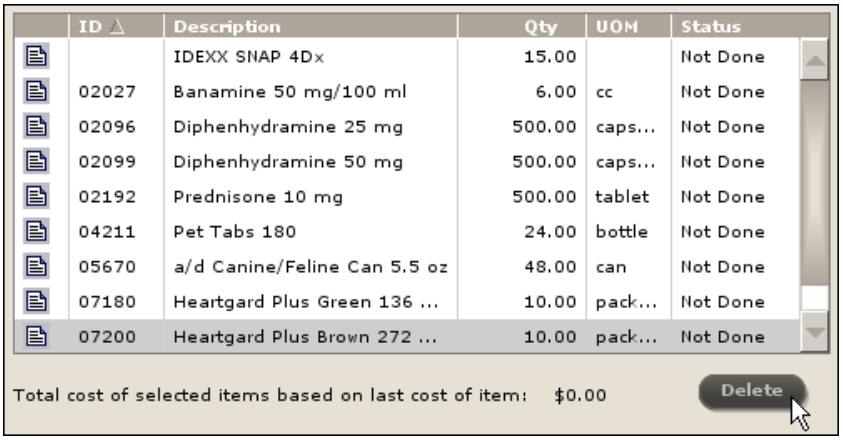
Deleting a Want List Item

In this demonstration, we will delete an item from the *Want List.*

1. Select **Inventory > Purchasing Work List**.
2. Deselect the **Suggested items** check box.
3. Click **Search**.
4. Select the item that does not need to be ordered.
5. Click **Delete**.
   - A confirmation window may display.
6. Click **Yes**.



7. Close any open windows.

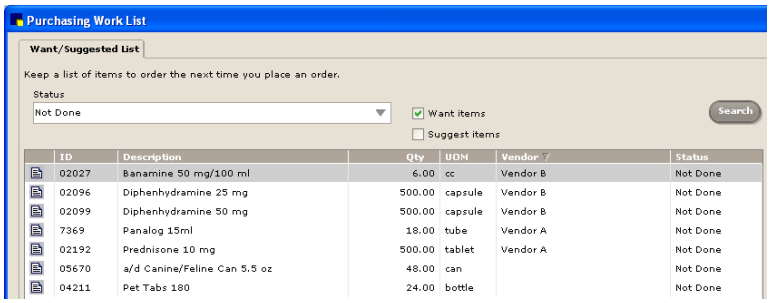

ID
Description
Qty
UOM
Status
IDEXX SNAP 4Dx 15.00 Not Done
02027 Banamine 50 mg/100 ml 6.00 cc Not Done
02096 Diphenhydramine 25 mg 500.00 caps... Not Done
02099 Diphenhydramine 50 mg 500.00 caps... Not Done
02192 Prednisone 10 mg 500.00 tablet Not Done
04211 Pet Tabs 180 24.00 bottle Not Done
05670 a/d Canine/Feline Can 5.5 oz 48.00 can Not Done
07180 Heartgard Plus Green 136 ... 10.00 pack... Not Done
07200 Heartgard Plus Brown 272 ... 10.00 pack... Not Done
Total cost of selected items based on last cost of item: $0.00
Delete

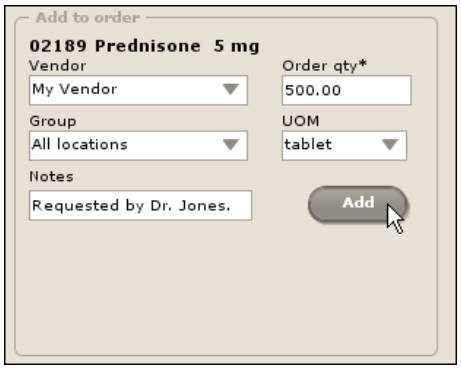
tip When selecting more than one item to delete, use **Shift** to select a consecutive group of items and **Ctrl** to select non-consecutive items on the list.

Transfer Wanted/Suggested Items to Purchase Order

In this demonstration, you will add an item to a purchase order from the *Want List*.

1. Select **Inventory** > **Purchasing Work List**.
2. Deselect the **Suggest items** check box.
3. Click **Search**.
4. Select the item you added to the *Want List*.
5. In the *Add to Order* area, select the vendor where the item will be ordered from the *Vendor* list.
6. Enter the quantity in the *Order qty* field.
7. Optional: Select the buying unit of measure for the product being ordered in the *UOM* list.
8. Optional: Enter or update any notes about the order.

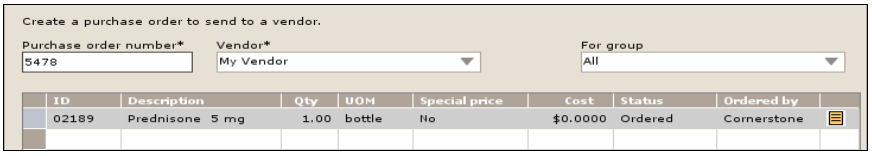

Purchasing Work List
Want/Suggested List
Keep a list of items to order the next time you place an order.
Status
Not Done
Want items
Suggest items
Search
ID
Description
Qty
UOM
Vendor
Status
02027 Banamine 50 mg/100 ml 6.00 cc Vendor B Not Done
02096 Diphenhydramine 25 mg 500.00 capsule Vendor B Not Done
02099 Diphenhydramine 50 mg 500.00 capsule Vendor B Not Done
7369 Panalog 15ml 18.00 tube Vendor A Not Done
02192 Prednisone 10 mg 500.00 tablet Vendor A Not Done
05670 a/d Canine/Feline Can 5.5 oz 48.00 can Not Done
04211 Pet Tabs 180 24.00 bottle Not Done



9. Click **Add** to create a new purchase order. The *Add a New Purchase Order* window displays.

If a purchase order already exists for the vendor, the *Edit Purchase Order for [Vendor name]* window displays and the item will be added to the existing purchase order.

10. Tab past the Purchase order number field for Cornerstone to assign a purchase order number.



11. Press **Tab** to leave the field.

The item is now listed on the purchase order.

12. Click **Save**

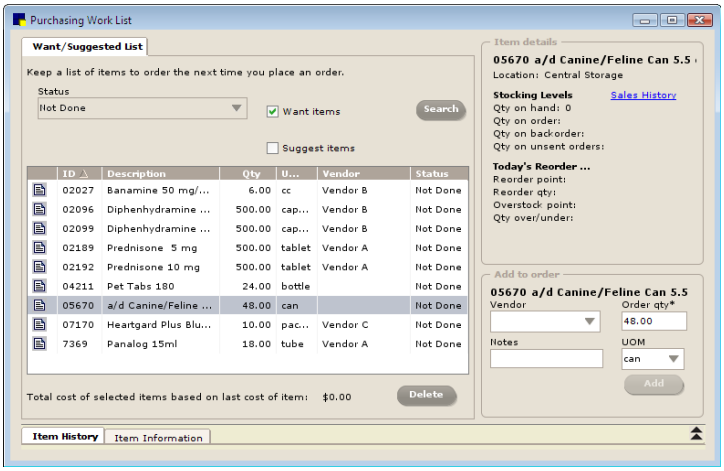
.
13. Close the *Purchasing Work List.*

Multi-Location is not turned on if you don't see the *Locate an Item* and *Location* tabs. (Use arrows/graphics to point to these tabs.)

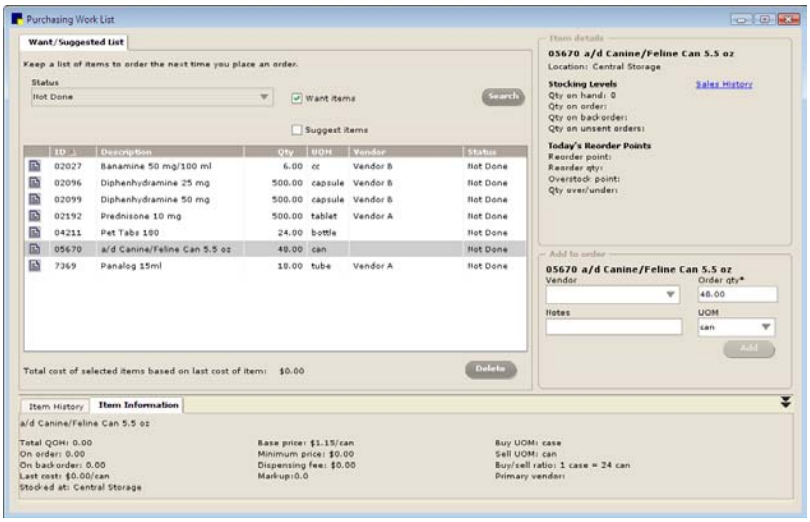
Viewing Item History and Item Information

In this demonstration, you will view the Item History and Item Information for a/d Canine/Feline in the *Purchasing Work List*.

1. Select **Inventory > Purchasing Work List** and the *Purchasing Work List* displays the *Want/Suggested List*.
2. Deselect the **Suggest items** check box.
3. Click **Search**.
4. Select an item on the *Want/Suggested List*.



5. Click the **Expand** button (located in the lower right area of the window). The *Item History* displays.
6. Click the *Item Information* tab. View the information.
7. Click the **Collapse** button. The *Item Information* and *Item History* tabs are minimized.
8. Close the *Purchasing Work List* window.



Item Details Overview

The Item details area displays stocking levels and reorder point information for an item selected in the *Purchasing Work List*.

Item details information include:

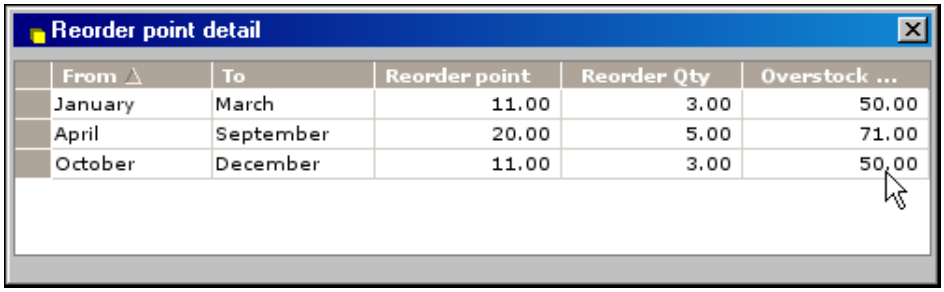
- **Item ID/Description**: The selected item's ID and description display when it is selected within the *Purchasing Work List* tab.

Stocking Levels information includes:

- **Qty on hand**: The quantity currently available
- **Qty on order**: The amount currently on a placed purchase order
- **Qty on backorder**: The amount currently on backorder
- **Qty on unsent orders**: The amount currently on a saved, but not placed, purchase order
- **Sales History** link: View the Sales History window for this item. This window displays the sales history for the last three years and includes year-to-date and month-to-date totals.

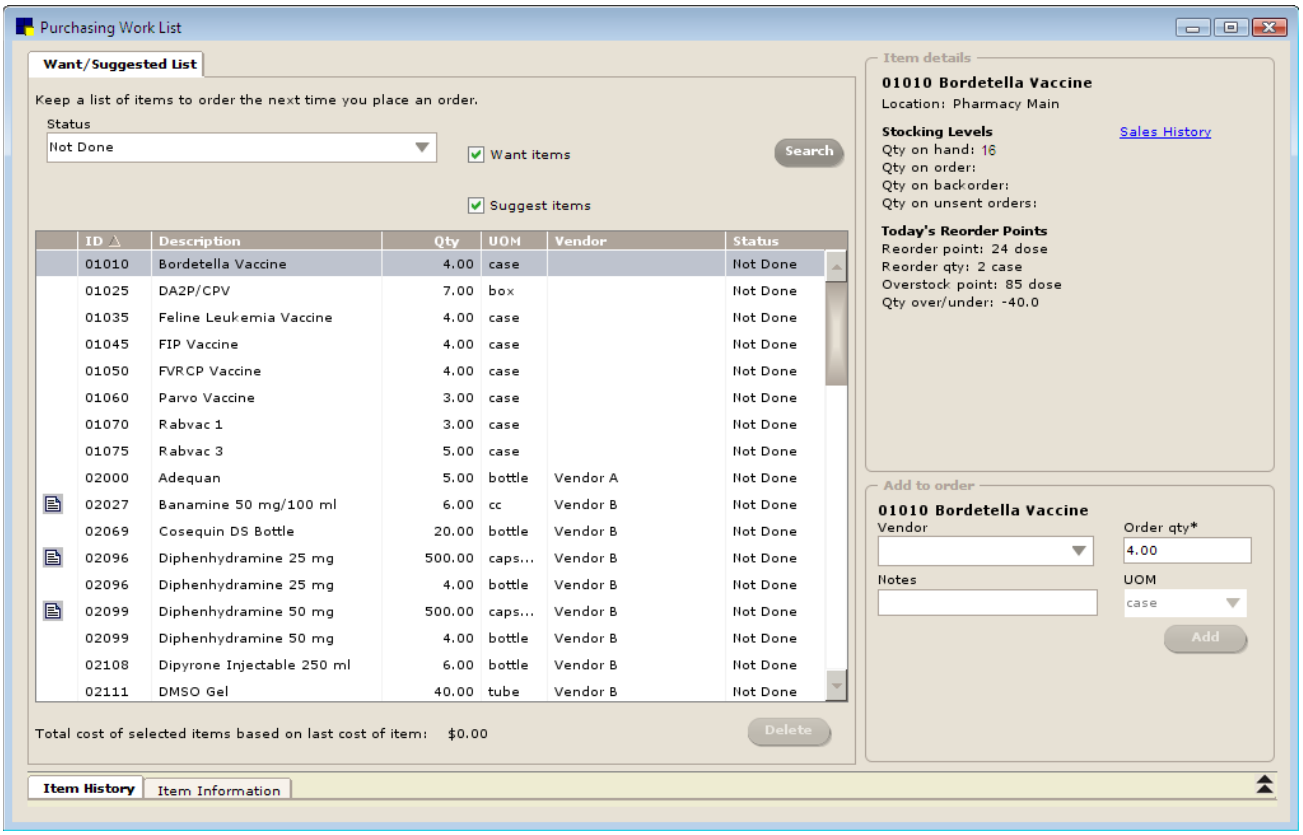
Today's Reorder Points information includes:

- **Reorder point:** The reorder point for the location.
- **Reorder qty**: The recommended amount to order when the reorder point is reached.
- **Overstock point**: The overstock point of the item.
- **View Details link**: If seasonal reorder point information exists for the item, this option will be available.



From	To	Reorder point	Reorder Qty	Overstock ...
January	March	11.00	3.00	50.00
April	September	20.00	5.00	71.00
October	December	11.00	3.00	50.00

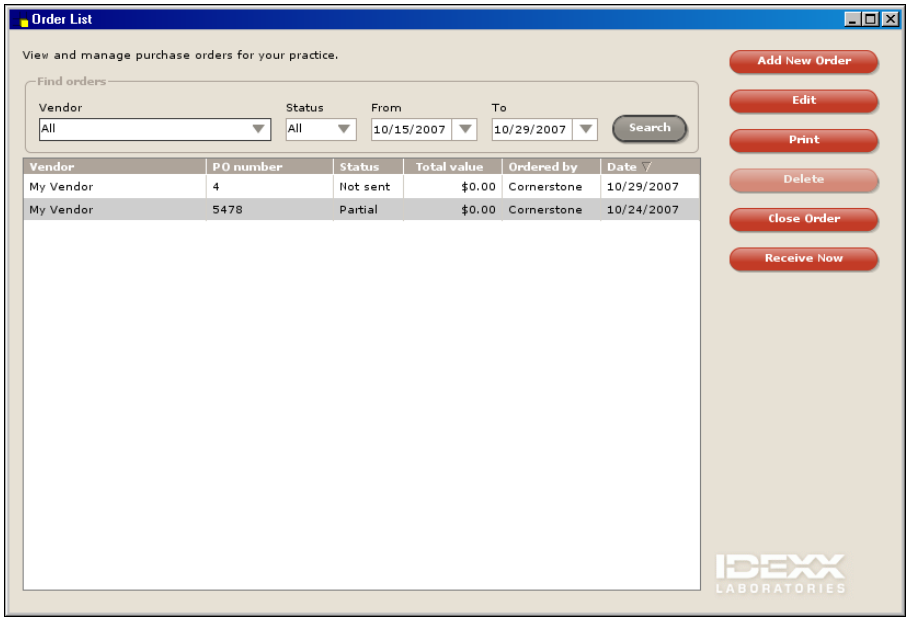
To view quantity on hand, select **Inventory** > **Purchasing Work List**. You can search within **Want** or **Suggested** items, or both, by selecting the appropriate check boxes and clicking **Search**. After you select an item from the list you can View the quantity on hand information in the *Item details* area.


Purchasing Work List
Want/Suggested List
Keep a list of items to order the next time you place an order.
Status
Not Done
Want items
Suggest items
Search
ID
Description
Qty
UOM
Vendor
Status
01010 Bordetella Vaccine 4.00 case Not Done
01025 DA2P/CPV 7.00 box Not Done
01035 Feline Leukemia Vaccine 4.00 case Not Done
01045 FIP Vaccine 4.00 case Not Done
01050 FVRCP Vaccine 4.00 case Not Done
01060 Parvo Vaccine 3.00 case Not Done
01070 Rabvac 1 3.00 case Not Done
01075 Rabvac 3 5.00 case Not Done
02000 Adequan 5.00 bottle Vendor A Not Done
02027 Banamine 50 mg/100 ml 6.00 cc Vendor B Not Done
02069 Cosequin DS Bottle 20.00 bottle Vendor B Not Done
02096 Diphenhydramine 25 mg 500.00 caps... Vendor B Not Done
02096 Diphenhydramine 25 mg 4.00 bottle Vendor B Not Done
02099 Diphenhydramine 50 mg 500.00 caps... Vendor B Not Done
02099 Diphenhydramine 50 mg 4.00 bottle Vendor B Not Done
02108 Dipyrone Injectable 250 ml 6.00 bottle Vendor B Not Done
02111 DMSO Gel 40.00 tube Vendor B Not Done
Total cost of selected items based on last cost of item: $0.00
Delete
Item details
01010 Bordetella Vaccine
Location: Pharmacy Main
Stocking Levels
Sales History
Qty on hand: 16
Qty on order:
Qty on backorder:
Qty on unsent orders:
Today's Reorder Points
Reorder point: 24 dose
Reorder qty: 2 case
Overstock point: 85 dose
Qty over/under: -40.0
Add to order
01010 Bordetella Vaccine
Vendor
Order qty*
4.00
Notes
UOM
case
Add
Item History
Item Information

Order List

To track items on order with vendors and orders that have been partially received from vendors within Cornerstone, use the *Order List* window.

Access the Order list by selecting **Inventory > Order List**. The *Order List* window displays orders managed by staff/management within the past two weeks.



When looking for specific purchase orders, enter information in one or more of the criteria fields in the *Find orders* area and click **Search**. Orders that match the criteria display on the *Order List*.

Find orders fields include:

- *Vendor* list: Select a vendor to view purchase orders for the specified vendor only.
- *Status* list: Select the status of the order. Options include **All**, **Not sent**, **Sent**, **Partial** and **Closed**.
- *From* field: The date two weeks prior to the current system date displays in the field. If necessary, manually type a beginning date or use the calendar in order to find orders on or after the selected date.
- *To* field: The current system date displays. If necessary, manually type an ending date or use the calendar in order to find orders on or after the selected date.

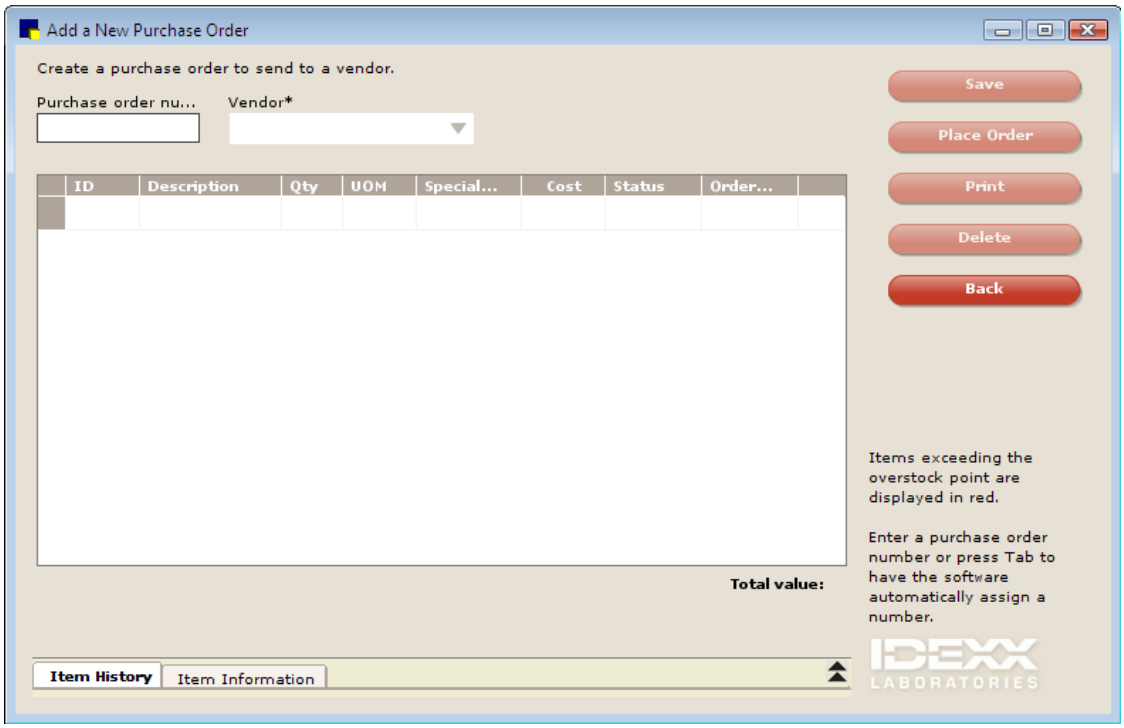
Order List columns include:

- **Vendor:** The vendor with whom the order was placed.
- **PO number:** The purchase order number.
- **Status:** The status of the order. Options include **All**, **Not sent**, **Sent**, **Partial** and **Closed**.
- **Total value:** The total cost of the order.
- **Ordered by:** The name of the staff member who was logged in at the time the order was initially entered.
- **Date:** The last date on which the order was worked.

tip A **Not sent** status indicates an order has been saved but not placed. This is useful if more items will be added to the order at a later point. A **Sent** status indicates the order is ready for the vendor and has been placed. A **Partial** status indicates the practice has received some of the items on the placed order from the vendor. A **Closed** status indicates all items on the order were received or the order was manually deleted by the practice.

Purchase Order Overview

To open the *Purchase Order* window, select **Inventory > Order List >** click **Add New Order** or **Edit**.



Purchase Order fields include:

- *Purchase order number* field: A purchase order number is a unique number that is used to track each order entered in Inventory.
- *Vendor* list: Select the vendor with whom the order will be placed.
- *Total value* field: The total cost of all items on the order.

Purchase Order columns include:

- **ID**: The item ID of the product to be ordered.
- **Description**: The name of the item to be ordered. The description can be manually changed but, when printing the purchase order, the original description displays.
- **Qty**: The total amount of the item to be ordered based on UOM. If the buy/sell ratio is set for the item and unit is changed to the selling unit, the quantity is calculated according to the ratio.
- **UOM**: The unit of measure for the item being ordered; the default is the buy UOM.
- **Special price**: If the item will be purchased at a special price, select **Yes** from the list. The item's vendor cost will not update when received which, in turn, will not affect the item markup. Examples of items purchased at special cost include free samples and promotional items.
- **Cost**: The unit cost of the item being ordered.
- **Status**: The state of the item being placed on an order. Options include **Ordered** and **Backorder**.
- **Ordered by**: Lists the name of the staff member who was logged in when the item was placed on the order.
- **Notes**: General information pertaining to the item being ordered.

tip An asterisk (*) indicates a required field. If the field is left blank or the information in the field is a duplicate of another entry, a message will display.

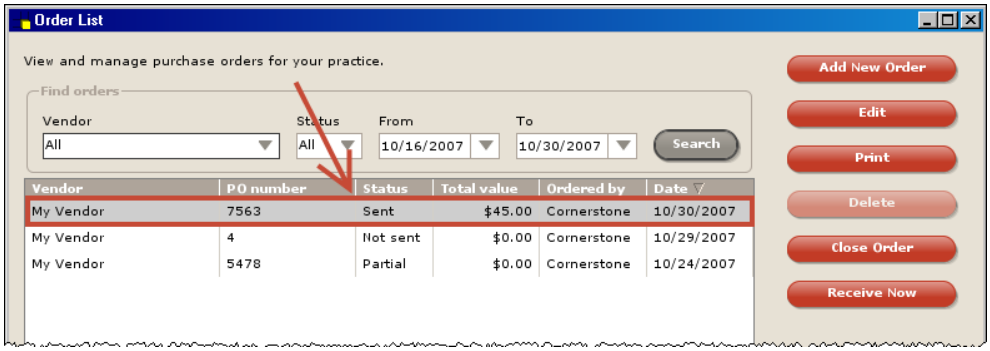
Creating Purchase Orders

In this demonstration, you will create and save a new purchase order.

1. Select **Inventory > Order List** and the *Order List* window displays orders managed within the last two weeks.
2. Click **Add New Order**. The *Add a New Purchase Order* window displays.
3. Enter your purchase order in the *Purchase order number* field and press **Tab**.

   3.1 Manually enter a purchase order number or you can press **Tab** to have Cornerstone automatically assign a purchase order number.

4. From the *Vendor* list, select the vendor with whom the order will be placed.
5. Search for and select the items to be ordered from the vendor.
6. Enter the quantity to be ordered in the *Qty* field.



7. Optional: Change the unit of measure. The buying unit of measure automatically displays. Change the buying unit of measure if you are ordering a nonstandard quantity.
8. Optional: If this is an item being purchased at a special price which shouldn't affect the item markup or vendor cost, select **Yes** in the list of the *Special price* column.
9. Optional: Enter the unit cost of the product, if known. The last cost entered for the item will automatically appear in the cost field.

   Any inventory item can be ordered, regardless of QOH tracking status.

10. Verify the status is **Ordered**.
11. Click the **Note** icon and type the information. A paper icon displays indicating a note is attached.
12. Continue placing the rest of items on your purchase order.
13. Click **Save** to save the order (and be able to return and edit it) or click **Place Order** to place the order. For this demonstration, click **Save**. The *Order List* window displays the new order.
14. Close all open windows.

Modifying a Purchase Order

In this demonstration you will modify a new purchase order.

1. Select **Inventory** > **Order List** and the *Order List* window displays orders managed within the last two weeks.
2. Click **Add New Order**. The *Add a New Purchase Order* window displays.
3. Type **7563** in the *Purchase order number* field and press **Tab**.

   Manually enter a purchase order number or you can press **Tab** to have Cornerstone automatically assign a purchase order number.

4. From the *Vendor* list, select the vendor with whom the order will be placed. For this demonstration, select **My Vendor**.
5. Search for and select the items to be ordered from the vendor. For this demonstration, in the *ID* field type **02441** for **Clavamox® Drops** and press **Tab**.
6. Enter the quantity to be ordered in the *Qty* field. For this demonstration, type **6.00**.
7. Optional: Change the unit of measure. The buying unit of measure automatically displays. For this demonstration, the unit of measure will not be changed. Verify the UOM is **bottle**.
8. Optional: If this is an item being purchased at a special price which shouldn't affect the item markup, select **Yes** in the list of the *Special price* column. For this demonstration, verify the special price is set to **No**.
9. Optional: Enter the unit cost of the product, if known. For this demonstration, type **7.500.**
10. Verify the status is **Ordered**.
11. Click the **Note** icon and type the information. A paper icon displays indicating a note is attached. For this demonstration, type **Only 1 left** and click **Save** to save the note.
12. Continue placing the following items on your purchase order.

Item and ID	Qty	UOM	Notes
Toothbrush (09042)	3	Box	None
Clavamox® 375mg (02438)	4	Bottle	None
Bordetella Vaccine (01010)	72	Dose	None
HistaCalm Shampoo 8oz (7368)	10	Bottle	None

14. Click **Save** to save the order (and be able to return and edit it) or click **Place Order** to place the order. For this demonstration, click **Save**. The *Order List* window displays the new order.
15. Close all open windows.

Modifying Purchase Orders

In this demonstration, you will be adding an item to an existing order and placing the order.

1. Select **Inventory > Order List**.
2. Select an order that has a status of **Not sent** or **Sent**. For this demonstration, select the order that was created in the previous exercise.

ID	Description	Qty	UOM	Special...	Cost	Status	Order...	
01010	Bordetella Vac...	72.00	dose	No	$0.0000	Ordered	Corners...	
02438	Clavamox 37...	4.00	bottle	No	$0.0000	Ordered	Corners...	
09042	Toothbrush	3.00	box	No	$0.0000	Ordered	Corners...	
7368	HistaCalm Sh...	10.00	bottle	No	$0.0000	Ordered	Corners...	
02441	Clavamox Dro...	6.00	bottle	No	$7.5000	Ordered	Corners...	
02177	Predef 2X 100...	2.00	bottle	No	$0.0000	Ordered	Corners...	

3. Click **Edit**. The *Edit Purchase Order for [Vendor Name]* window displays.
4. Make any necessary changes to the order.
5. Verify the following:
   - Qty
   - UOM
   - Special price
   - Cost
   - Status
6. Save or place the order. For this demonstration, click **Place Order**.
7. The *Order List* window displays the purchase order with a status of **Sent**.

8. Close the *Order List* window.

Special Purchase Scenarios: Rabies Vaccines, Heartworm, Flea/Tick Prevention

There are times when you will need to purchase items in quantities that are different than your buy/sell ratio. For those types of items it is recommended to complete the following steps:

1. On the *Order* window, select and enter the inventory item.
2. Change the unit of measure to the selling unit of measure.
3. Enter the order quantity, keeping in mind the unit of measure.
4. Enter the item's cost, if available.

By entering the purchase in this way, you will be able to determine when an item has been ordered and received in the nonstandard quantity.

When receiving the item, you will need to ensure the cost is entered as the selling unit's cost.

Section 4

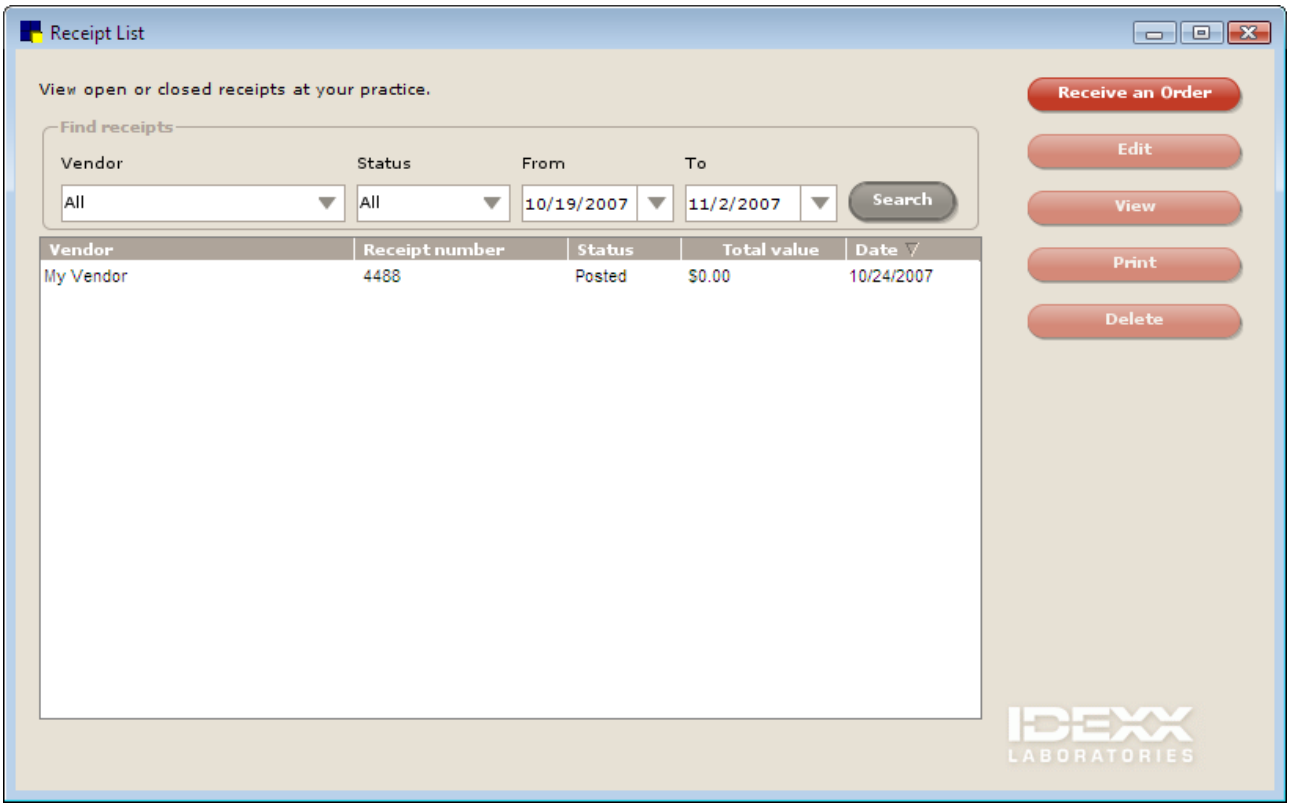
Receive

Receipt Management

Receipt List Overview

This lesson highlights the *Receipt List* window.

Open the *Receipt List* window by selecting **Inventory** > **Receipt List.** The *Receipt List* window displays receipts entered in the past two weeks and is sorted by date.



When looking for a specific receipt, enter information in one or more of the criteria fields provided in the *Find receipts* area and click **Search**. Receipts that match the selected criteria display in the *Receipt List* window.

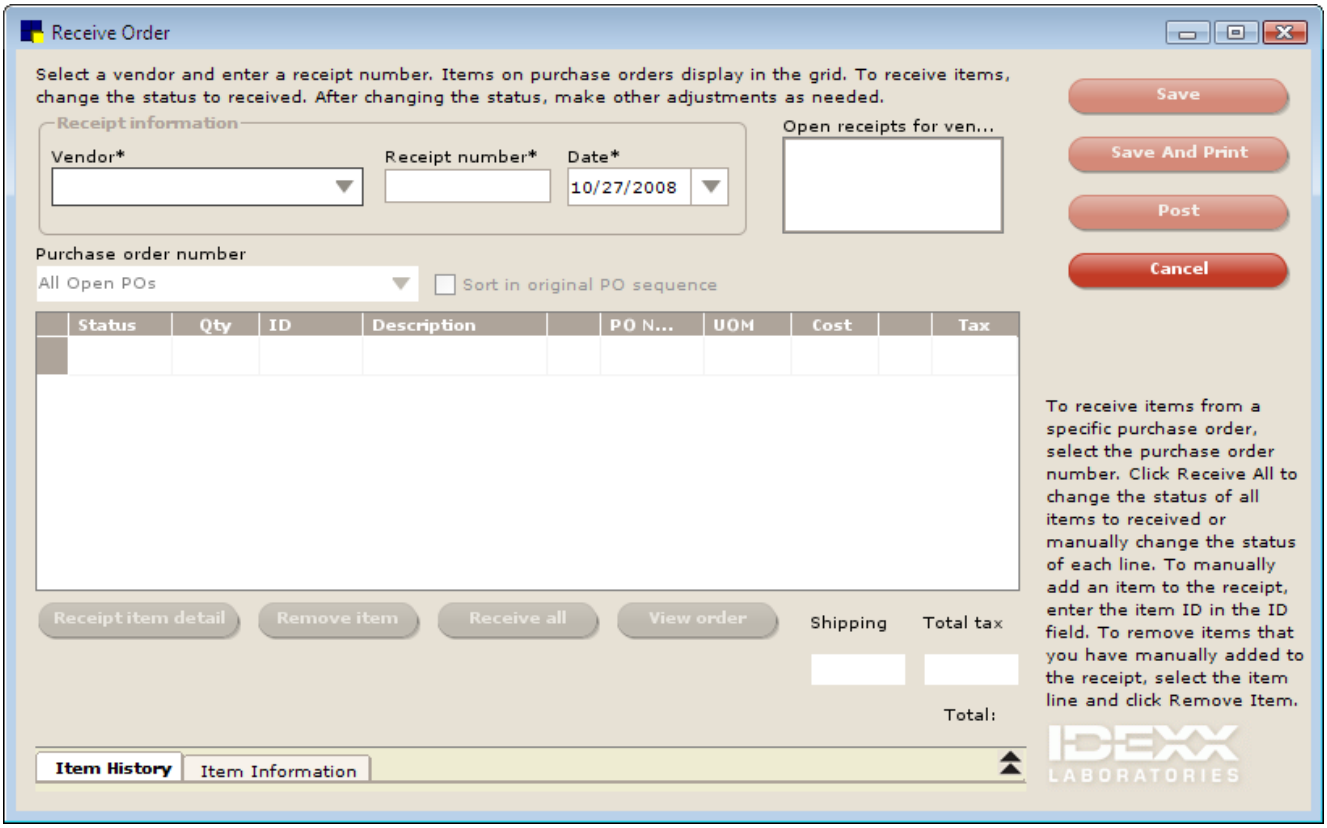
Find receipts fields include:

- **Vendor** list: View receipts for a specific vendor only.
- **Status** list: View receipts with a specific status (**All**, **Posted** and **Not Posted**). **Posted** indicates the receipt is complete and has been processed; information cannot be changed. **Not Posted** indicates item information for a receipt has been saved but not processed; information can be edited and posted.
- **From** list: The two weeks prior to the current system date displays in the field. Manually type a beginning date or click the arrow and select a date from the calendar in order to find receipts on or after a certain date.
- **To** list: The current system date displays in the field. If necessary, type an ending date or click the arrow and select a date from the calendar in order to find receipts on or before a certain date.

Receive Order Overview

This lesson highlights the *Receive Order* window.

From the *Receipt List* window click **Receive an Order** to open the *Receive Order* window.


Receive Order
Select a vendor and enter a receipt number. Items on purchase orders display in the grid. To receive items, change the status to received. After changing the status, make other adjustments as needed.
Receipt information
Vendor*
Receipt number*
Date*
10/27/2008
Open receipts for ven...
Save
Save And Print
Post
Cancel
Purchase order number
All Open POs
Sort in original PO sequence
Status
Qty
ID
Description
PO N...
UOM
Cost
Tax
To receive items from a specific purchase order, select the purchase order number. Click Receive All to change the status of all items to received or manually change the status of each line. To manually add an item to the receipt, enter the item ID in the ID field. To remove items that you have manually added to the receipt, select the item line and click Remove Item.
Receipt item detail
Remove item
Receive all
View order
Shipping
Total tax
Total:
Item History
Item Information
IDEXX LABORATORIES

Receive Order fields include:

- *Vendor* list: Select the vendor from which the items are being received.
- *Receipt number* field: Type the invoice or packing slip number provided by the vendor.
- *Date* field: This is the date the shipment is received. The current system date will automatically display but can be changed if necessary.
- *Open receipts for vendor* box: If you have any open, unfinished receipts for this vendor, they will display here. To finish one of these receipts, select the receipt from the box.
- *Purchase order number* list: Select an order to find the items on a specific purchase order.
- **Sort in Original PO Sequence** check box: Select this check box to sort the items in the original purchase order sequence.
- *Shipping* field: Enter any shipping charges that apply.
- *Total tax* field: Type the total amount of tax that applies to the shipment. If entering tax for the individual items on the receipt, the total for all line items is calculated and displays in the field.
- *Total* field: View the total cost of the items on the receipt. This total should match the total provided by the vendor on the invoice or packing slip.

Columns on the receipt include:

- **ID:** The item ID of the product placed on a purchase order.
- **Description**: The name of the item placed on a purchase order.
- **Note**: A note added to the line item.
- **PO number:** The numerical code assigned the purchase order the item was placed on.
- **Qty:** The total quantity for the item placed on the purchase order. Based on the unit of measure.
- **UOM**: The buying unit of measure for the item.
- **Cost**: The unit cost of the item
- **Special price:** If the item is purchased at a special price, click the icon. As a result, the item's vendor cost will not update. The special price will still figure into the average cost.
- **Tax**: The individual tax that applies to the item (if applicable)
- **Status**: The status of an item; statuses are available when receiving a purchase order.

You can sort columns by clicking on the column headers.

Receive Order buttons include:

Receipt item detail is used to enter additional information for an item including lot numbers and/or expiration dates and quantity. Items in red on the *Receive Order* window require this information be entered. If the information is not entered, the receipt cannot be posted.

Remove item is used to remove a manually-added item. In other words, if an item wasn't on the original purchase order but you manually added it on your *Receive Order* window, it creates a manually-added item. To delete that item, select the line to remove and click **Remove Item**. Note: To remove an item that is listed on the receipt but originated from the purchase order, set the *Status* to **Cancelled**.

Receive all is used to change the status of all items on the receipt to received.

View order is used to look at the purchase order for the item. Select the item and click **View purchase order**. The *View Purchase Order for [Vendor name]* window displays the detailed information for the order. Click **Back** to return to the *Receive Order* window.

Save is used to save, but not post, the receipt on the *Receive Order* window. Because the receipt has not been posted at this point, staff can open and work on the receipt.

Save and Print is used to print a receipt. Click **Save and Print** and a Receipt Report displays the current details of the receipt. Preview, print or save a copy of the receipt and click **Back** to return to the *Receive Order* window. Items on saved receipts do not update QOH.

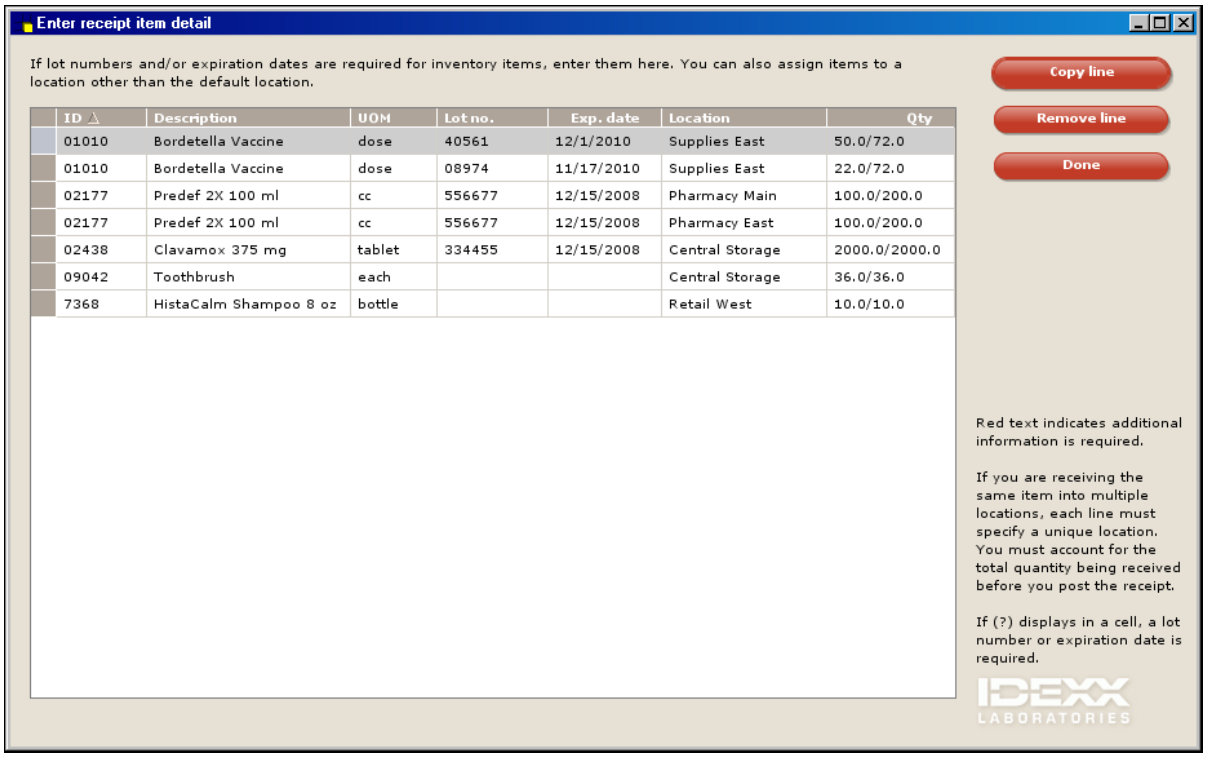
Post is used to process a completed receipt. Click **Post**. The *Change prices* window displays each item being received except items designated as special price items. Make any necessary changes to the pricing information for the items and click **Post**. QOH and cost information is updated and items are received into the correct locations.

Cancel is used to discontinue a receipt. Click **Cancel** and, if the confirmation window displays, click **Yes**. The *Receipt List* window displays.

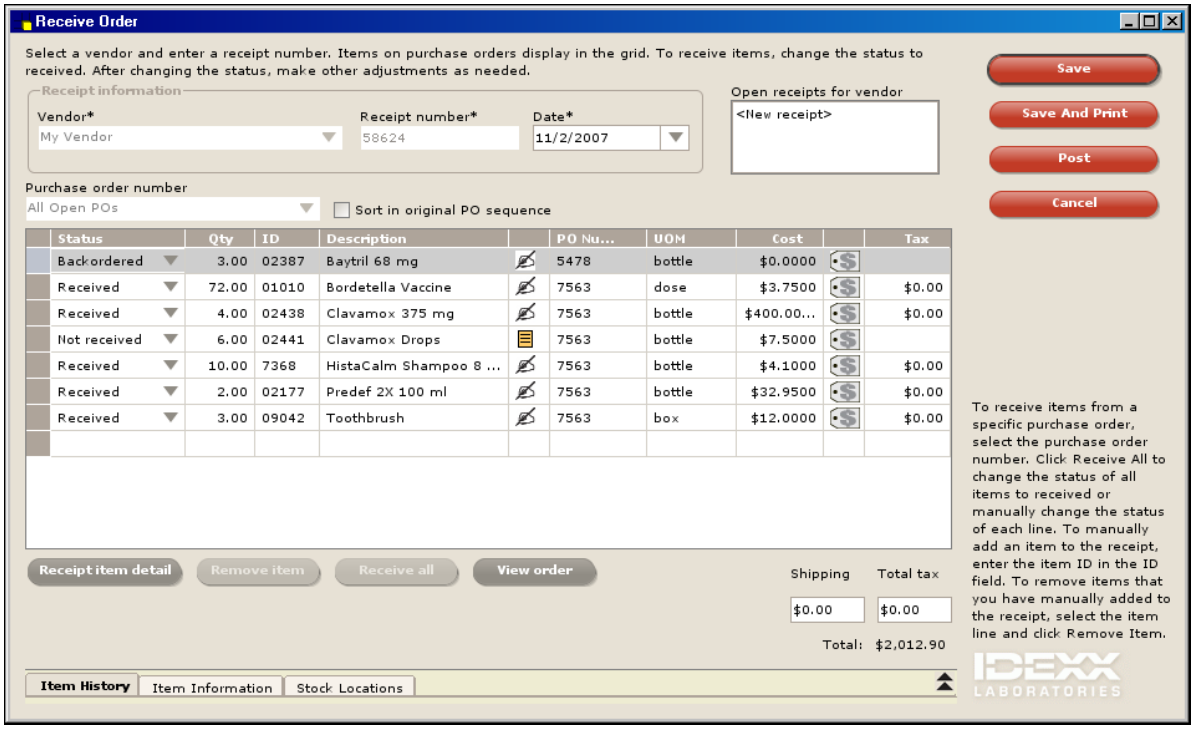
Adding a New Receipt - Receive Order

In this demonstration, you will create a receipt containing multiple items and save it.

1. Select **Inventory** > **Receipt List**. The Receipt List window displays receipts entered in the last two weeks.
2. Click **Receive an Order**. The Receive Order window displays.
3. From the *Vendor* list, select the vendor from which items are being received. If there are open receipts for the vendor, they will display in the Open Receipts for Vendor box.
4. Type the invoice or packing slip number provided by the vendor in the *Receipt number* field.
   - This number must be unique for the vendor. If the number entered is a duplicate, a message will display.
5. Enter a receipt date in the *Date* field.
6. Items on purchase orders will display in the grid. Mark the items shown below as received; select **Received** in the *Status* field.
7. Adjust the receipt information for the items in the Receive Order columns. Change the quantity, UOM and cost to match your vendor invoice.
   - You will not receive ALL of the items on the original purchase order. Select the status of Back Order on one item.
   - An asterisk () indicates a required field. If the field is left blank or the information in the field is a duplicate of another entry, a message will display.
8. Click **Receipt item detail** to add the details (location where the item is being received, lot numbers and expiration dates).
   - The Enter receipt item detail window displays.
   - Items that appear in black do not require lot number or expiration date information. Items that appear in red DO require lot number and/or expiration date information. Fields that must be filled in contain a red “(?)” in the field.
   - If multiple lot numbers and/or expiration dates were received, copy the line first then add the lot numbers and expiration dates appropriately.


Enter receipt item detail
If lot numbers and/or expiration dates are required for inventory items, enter them here. You can also assign items to a location other than the default location.
ID
Description
UOM
Lot no.
Exp. date
Location
Qty
01010 Bordetella Vaccine dose 40561 12/1/2010 Supplies East 50.0/72.0
01010 Bordetella Vaccine dose 08974 11/17/2010 Supplies East 22.0/72.0
02177 Predef 2X 100 ml cc 556677 12/15/2008 Pharmacy Main 100.0/200.0
02177 Predef 2X 100 ml cc 556677 12/15/2008 Pharmacy East 100.0/200.0
02438 Clavamox 375 mg tablet 334455 12/15/2008 Central Storage 2000.0/2000.0
09042 Toothbrush each Central Storage 36.0/36.0
7368 HistaCalm Shampoo 8 oz bottle Retail West 10.0/10.0
Copy line
Remove line
Done
Red text indicates additional information is required.
If you are receiving the same item into multiple locations, each line must specify a unique location. You must account for the total quantity being received before you post the receipt.
If (?) displays in a cell, a lot number or expiration date is required.
IDEXX LABORATORIES

9. Click **Done**.
    - You will return to the Receive Order window. Some items did not arrive in the shipment. They will remain on the order and no details will be filled in.


Receive Order
Select a vendor and enter a receipt number. Items on purchase orders display in the grid. To receive items, change the status to received. After changing the status, make other adjustments as needed.
Receipt information
Vendor*
My Vendor
Receipt number*
58624
Date*
11/2/2007
Open receipts for vendor
<New receipt>
Save
Save And Print
Post
Cancel
Purchase order number
All Open POs
Sort in original PO sequence
Status
Qty
ID
Description
PO Nu...
UOM
Cost
Tax
Backordered 3.00 02387 Baytril 68 mg 5478 bottle $0.0000
Received 72.00 01010 Bordetella Vaccine 7563 dose $3.7500 $0.00
Received 4.00 02438 Clavamox 375 mg 7563 bottle $400.00... $0.00
Not received 6.00 02441 Clavamox Drops 7563 bottle $7.5000
Received 10.00 7368 HistaCalm Shampoo 8 ... 7563 bottle $4.1000 $0.00
Received 2.00 02177 Predef 2X 100 ml 7563 bottle $32.9500 $0.00
Received 3.00 09042 Toothbrush 7563 box $12.0000 $0.00
Receipt item detail
Remove item
Receive all
View order
Shipping
Total tax
$0.00
$0.00
Total: $2,012.90
Item History
Item Information
Stock Locations
To receive items from a specific purchase order, select the purchase order number. Click Receive All to change the status of all items to received or manually change the status of each line. To manually add an item to the receipt, enter the item ID in the ID field. To remove items that you have manually added to the receipt, select the item line and click Remove Item.
IDEXX LABORATORIES

10. **Save** or **Post** the receipt. For this demonstration, click Save.
    - The *Receipt List* window displays the new receipt with a status of **Not Posted**.
11. **Close** the *Receipt List*.

Posting receipts with some items still backordered or not received changes the status on order list to partial, but does not update the quantity on hand for the items received.

Backorder List Overview

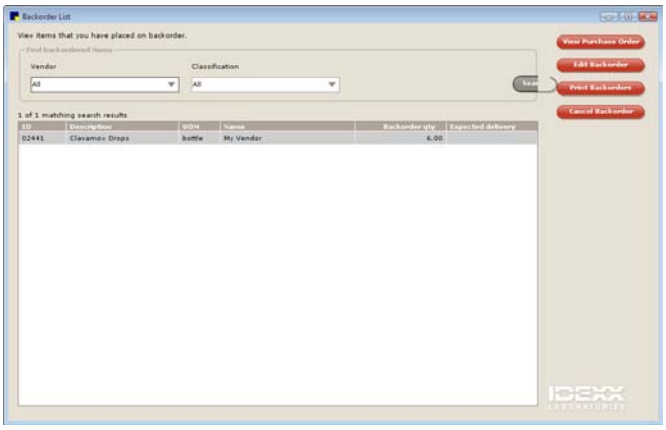
This lesson highlights the *Backorder List*. Backordering can only be used if purchase orders are entered.

To open the *Backorder List*, select **Inventory** > **Backorder List**. Backorders appear on the list if an item placed on a purchase order has a status of **Backordered** or if the item is placed on backorder when it is received. An item cannot be added to this list but the quantity on backorder may be modified or the backordered item may be cancelled. You can also add an expected receipt date or notes about the item.

To narrow the list of items, enter criteria in any of the *Find backorder items* area fields and click **Search**.

Find backordered items area fields include:

- *Vendor* list – View a list of backorders for a specific vendor.
- *Classification* list – View a list of backorders for a specific classification.

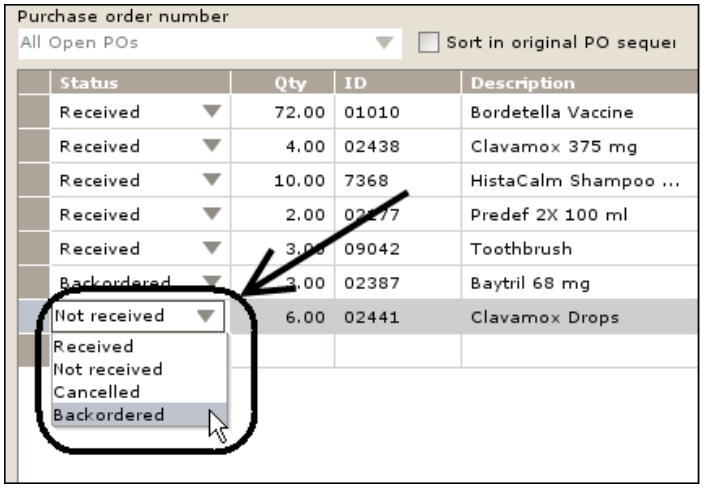


Modifying Inventory Receipts

In the demonstration, you will be placing 02441 Clavamox® Drops on backorder and saving the receipt.

Only items that were placed on a purchase order can be placed on backorder.

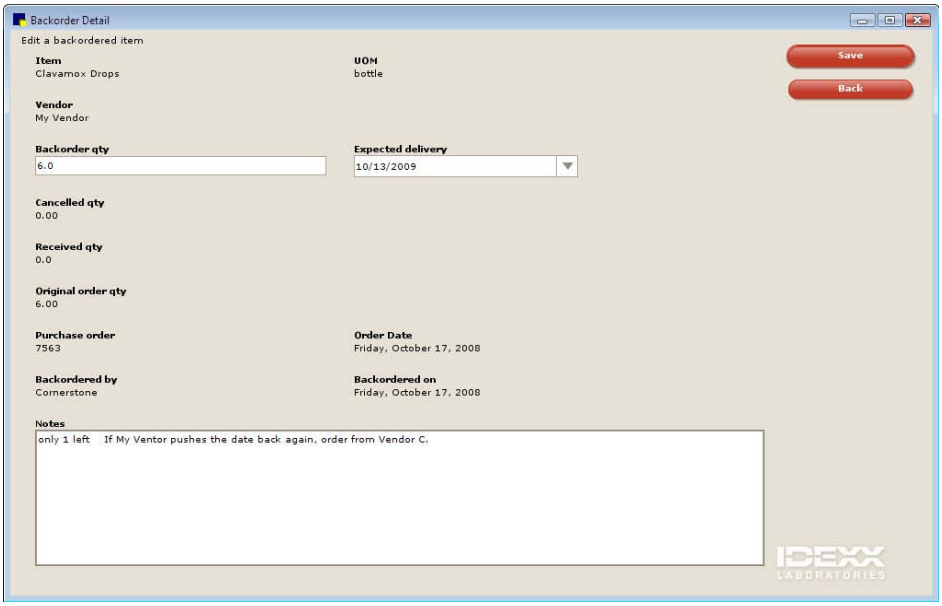
1. Select **Inventory** > **Receipt List**, select a receipt that has not been posted. For this demonstration, select **58624** and click **Edit**.
2. On the Clavamox® Drops (02441) line select **Backordered** from the *Status* field.
3. Click **Save**. The *Receipt List* window displays.
4. Close the *Receipt List*.



Editing a Backordered Item

In this demonstration, you will edit a backordered item.

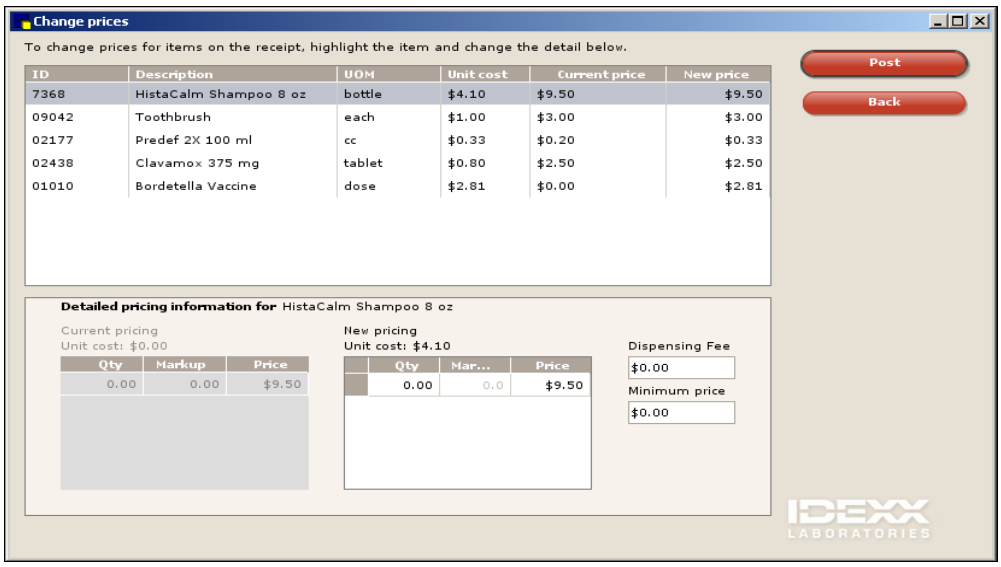
1. Select **Inventory > Backorder List**.
2. Select the backordered item to edit.
3. Click **Edit Backorder**.
4. Optional: In the *Backorder qty* field, enter a new quantity on backorder.
5. The *Cancelled qty, Received qty* and *Original Order qty* fields are updated to note the changes.
6. Optional: In the *Expected delivery* list, manually type a date or click the arrow to display a calendar and choose a date the item is expected to be delivered.
7. Optional: Type (or add) a note pertaining to the backordered item in the *Notes* field.
8. Click **Save**.
9. Close the *Backorder List* window.



Posting Inventory Receipts

For this demonstration, you will post your inventory receipt.

1. Select **Inventory** > **Receipt List**.
2. Select your receipt click **Edit**.
3. Click **Post**. The *Change prices* window displays.



Your results may appear different due to various staff using the training or prior missed demonstrations.

4. Optional: To change price information, select the item on the *Change prices* list. The current and new pricing information for the item displays in the *Detailed pricing information for [Name of Item]* area.
   - The new pricing unit cost equals the cost of the item from the *Receive Order* window. When receiving an item with more than one unit cost, the highest cost becomes the new unit cost. You may enter new markup information for the item in order to calculate a new price for the item or enter a new price to calculate the markup of the product.
   - Prices will not change if the item isn't set to Auto-calculate price (Lists > Invoice Item).
5. Optional: Enter a dispensing fee for the item in the *Dispensing Fee* field if appropriate.
6. Optional: Enter a minimum price for the item in the *Minimum price* field if appropriate.
7. Click **Post**. The quantity on hand and cost information for each item is updated and the items are received into the correct location. The *Receipt List* window displays the posted receipt.

   Multiple items can be selected at once using the **Shift** or **Control** keys then clicking **Return**.
8. Close the *Receipt List*.

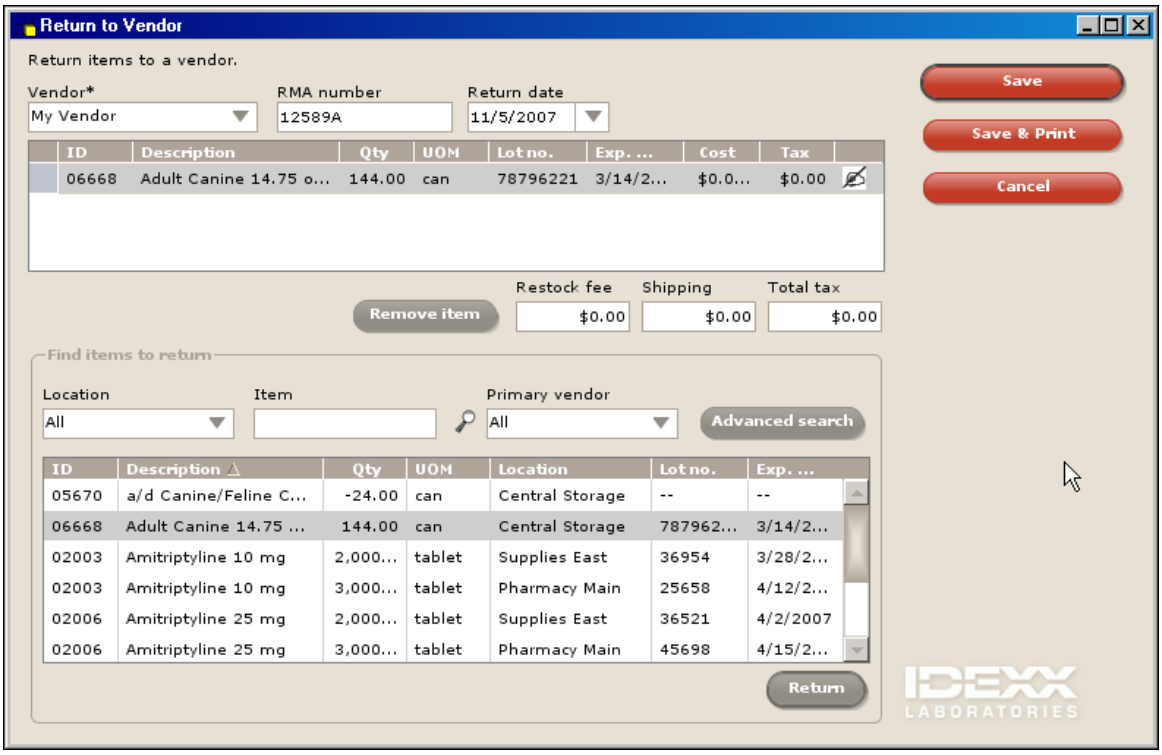
Return an Item to Vendor

Return to Vendor Overview

This lesson highlights the *Return to Vendor* window.

The *Return to Vendor* window contains several fields, a list of items to be returned to the vendor, and a *Find items to return* area used to search for and select items that need to be added to the list of returns. To access this window select **Inventory** > **Return to Vendor**.

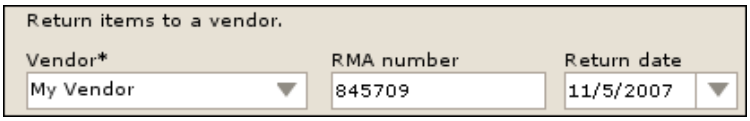
It is only possible to return items that are marked to maintain QOH.



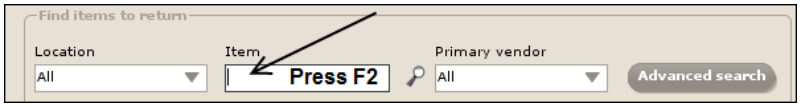
Returning Inventory to a Vendor

In this demonstration, we will return an invoice item from your invoice to the vendor.

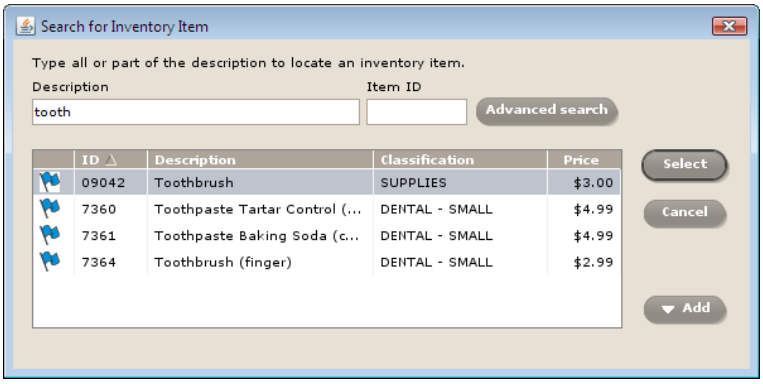
1. Select **Inventory > Return to Vendor**.
2. In the *Vendor* list, choose the vendor to which the inventory items will be returned.
3. Optional: Type the Return Merchandise Authorization number provided by the vendor in the *RMA number* field. This is an identification number provided by the vendor.



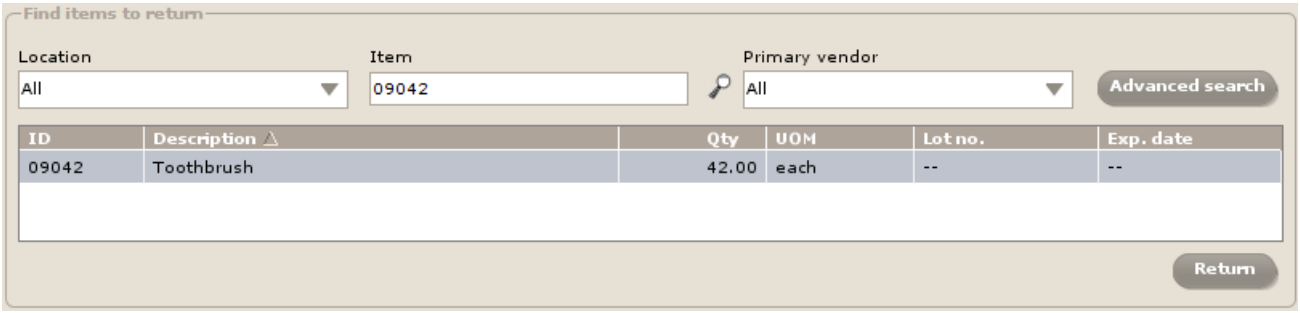
4. Optional: Enter a return date in the *Return date* list. This date field automatically inputs the current system date.
5. In the *Find items* to return area, enter the description of the item in the field or press **F2** in the Item field to search for the item to be returned.



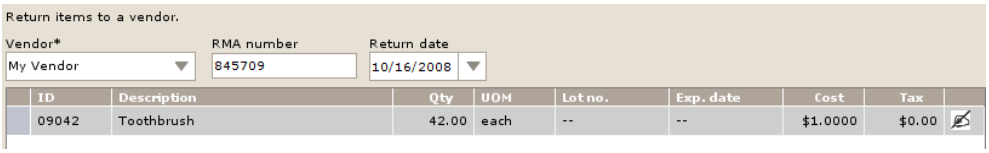
6. Choose your item and click **Select**.
7. In the *Find items to Return* area select the line for the item.
8. Click **Return**. The item is added to the *Return items to a Vendor* area.
9. Optional: Adjust the Qty, UOM, Lot no., Exp. date, Cost, and Tax information. For this demonstration there are no adjustments.



9.1 For this demonstration verify the following:

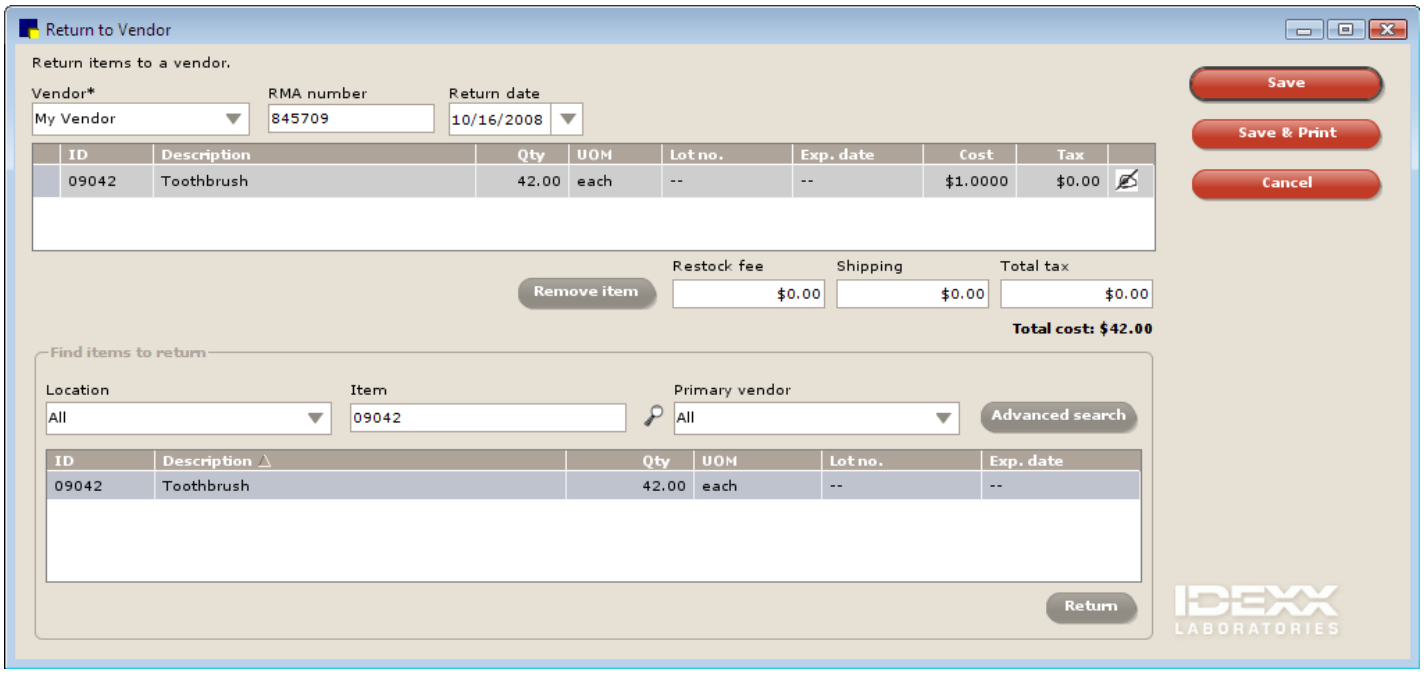


- Quantity
- Unit of Measure
- Lot number



- Expiration Date
- Cost
- Tax

10. Optional: Verify/Enter the Restock fee, Shipping, and Total tax.



11. Click **Save**.
12. Close the *Return to Vendor* window.

Section 5

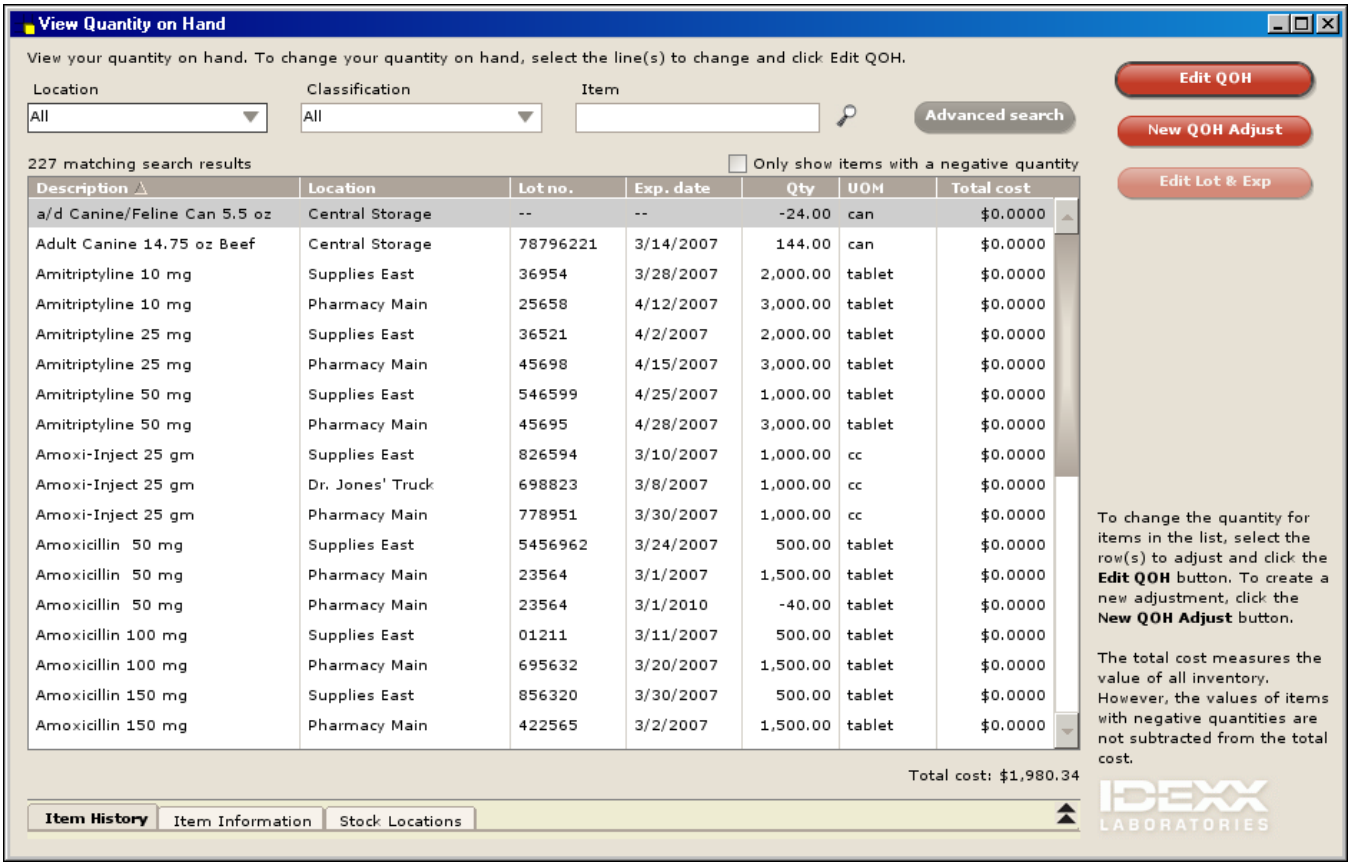
Deplete/Adjust/Move

View Quantity on Hand Window

This lesson highlights the *View Quantity on Hand* window.

To access the *View Quantity on Hand* window from Inventory, select **Inventory** > **View Quantity on Hand**. The *View Quantity on Hand* window displays all items marked to maintain quantity on hand.

To narrow the list of items, enter criteria in the available fields and click **Search**.


View Quantity on Hand
View your quantity on hand. To change your quantity on hand, select the line(s) to change and click Edit QOH.
Location
All
Classification
All
Item
Advanced search
Edit QOH
New QOH Adjust
Edit Lot & Exp
227 matching search results
Only show items with a negative quantity
Description
Location
Lot no.
Exp. date
Qty
UOM
Total cost
a/d Canine/Feline Can 5.5 oz Central Storage -- -- -24.00 can $0.0000
Adult Canine 14.75 oz Beef Central Storage 78796221 3/14/2007 144.00 can $0.0000
Amitriptyline 10 mg Supplies East 36954 3/28/2007 2,000.00 tablet $0.0000
Amitriptyline 10 mg Pharmacy Main 25658 4/12/2007 3,000.00 tablet $0.0000
Amitriptyline 25 mg Supplies East 36521 4/2/2007 2,000.00 tablet $0.0000
Amitriptyline 25 mg Pharmacy Main 45698 4/15/2007 3,000.00 tablet $0.0000
Amitriptyline 50 mg Supplies East 546599 4/25/2007 1,000.00 tablet $0.0000
Amitriptyline 50 mg Pharmacy Main 45695 4/28/2007 3,000.00 tablet $0.0000
Amoxi-Inject 25 gm Supplies East 826594 3/10/2007 1,000.00 cc $0.0000
Amoxi-Inject 25 gm Dr. Jones' Truck 698823 3/8/2007 1,000.00 cc $0.0000
Amoxi-Inject 25 gm Pharmacy Main 778951 3/30/2007 1,000.00 cc $0.0000
Amoxicillin 50 mg Supplies East 5456962 3/24/2007 500.00 tablet $0.0000
Amoxicillin 50 mg Pharmacy Main 23564 3/1/2007 1,500.00 tablet $0.0000
Amoxicillin 50 mg Pharmacy Main 23564 3/1/2010 -40.00 tablet $0.0000
Amoxicillin 100 mg Supplies East 01211 3/11/2007 500.00 tablet $0.0000
Amoxicillin 100 mg Pharmacy Main 695632 3/20/2007 1,500.00 tablet $0.0000
Amoxicillin 150 mg Supplies East 856320 3/30/2007 500.00 tablet $0.0000
Amoxicillin 150 mg Pharmacy Main 422565 3/2/2007 1,500.00 tablet $0.0000
Total cost: $1,980.34
To change the quantity for items in the list, select the row(s) to adjust and click the Edit QOH button. To create a new adjustment, click the New QOH Adjust button.
The total cost measures the value of all inventory. However, the values of items with negative quantities are not subtracted from the total cost.
Item History
Item Information
Stock Locations
IDEXX LABORATORIES

Items with quantity on hand of zero will automatically be removed from this window after 14 days. There is no way to remove those items from the window without turning off quantity on hand tracking. However, call Support at 1-800-283-8386 to have a technician perform a setting modification so that items with a zero QOH will be removed after 1 day.

When quantity on hand is edited for an item, it will create multiple listings in the *View Quantity on Hand* window.

tip Review this window for negative quantities on hand on any items. Then review its cost. If an adjustment is needed, make the adjustement under Adjustment > Adjustment List.

Edit a Quantity on Hand

Quantity on Hand and Expiration Date Adjustments

Adjustments are generally made due to a physical count of inventory, damaged or expired products, and entry errors. This lesson will explain how to adjust the quantity on hand for an inventory item.

Edit QOH is used to adjust the existing quantity on hand for an item that displays on the *View Quantity on Hand* list.

New QOH Adjust is used to adjust the quantity on hand for an item that does not have a QOH listed and does not appear on the *View Quantity on Hand* list.

tip Use **Edit QOH** when a quantity on hand is already recorded. Use **New QOH** if no quantity on hand is recorded.

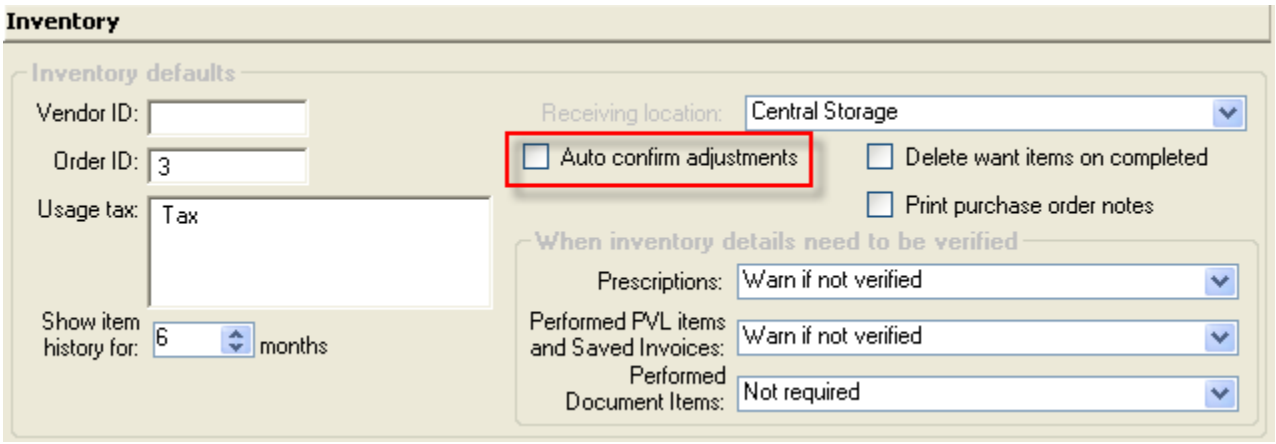
Edit Lot and Exp - use this when entering expiration dates and lot numbers for existing QOH for the QOH will go to zero for the non-expiration date and lot number items.

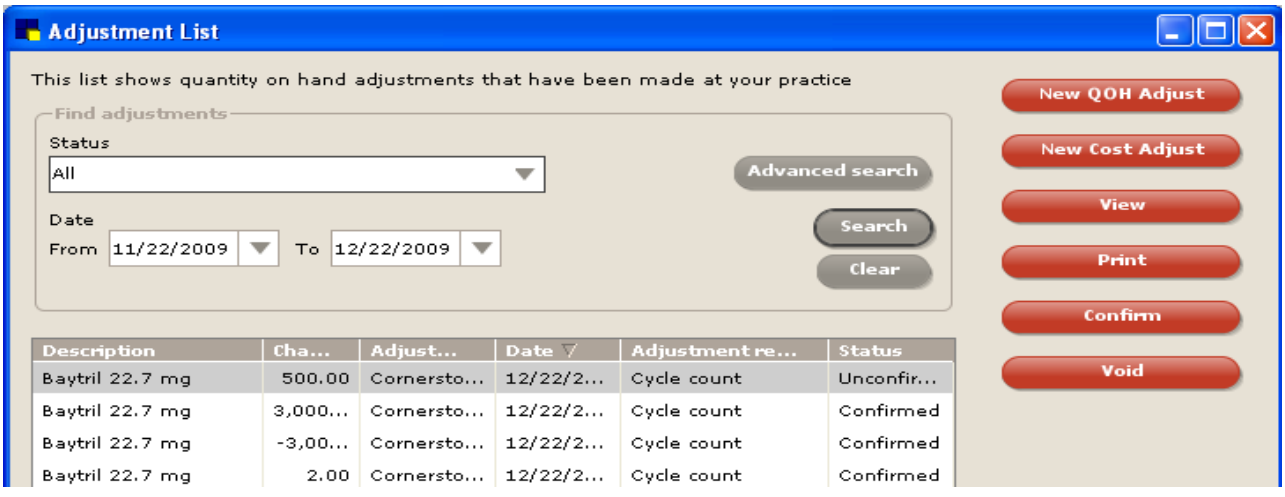
There are two methods to adjust expiration dates:

1. Using the **New QOH Adjust** (found on the View Quantity on Hand Adjustment List)
2. Using the **Edit Lot and Exp**

Note: When using this method, after the adjustment you will notice two lines on the *View Quantity on Hand* window. One for the new entry and one with the old expiration date. The old expiration date will disappear from the list in 14 days.

tip If the 'Auto confirm adjustments' box isnot marked under **Controls** > **Defaults** > **Practice and Workstation** > **Inventory**, then you will need to confirm the entry uner **Lists** > **Adjustment List** before it will display on the *View Quantity on Hand* window.

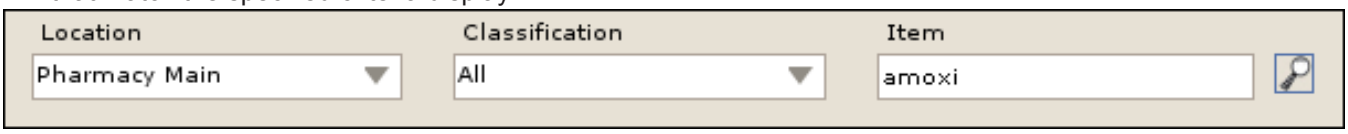



Adjustment List
This list shows quantity on hand adjustments that have been made at your practice
Find adjustments
Status
All
Advanced search
Date
From 11/22/2009
To 12/22/2009
Search
Clear
New QOH Adjust
New Cost Adjust
View
Print
Confirm
Void
Description | Cha... | Adjust... | Date | Adjustment re... | Status
Baytril 22.7 mg | 500.00 | Cornersto... | 12/22/2... | Cycle count | Unconfir...
Baytril 22.7 mg | 3,000... | Cornersto... | 12/22/2... | Cycle count | Confirmed
Baytril 22.7 mg | -3,00... | Cornersto... | 12/22/2... | Cycle count | Confirmed
Baytril 22.7 mg | 2.00 | Cornersto... | 12/22/2... | Cycle count | Confirmed

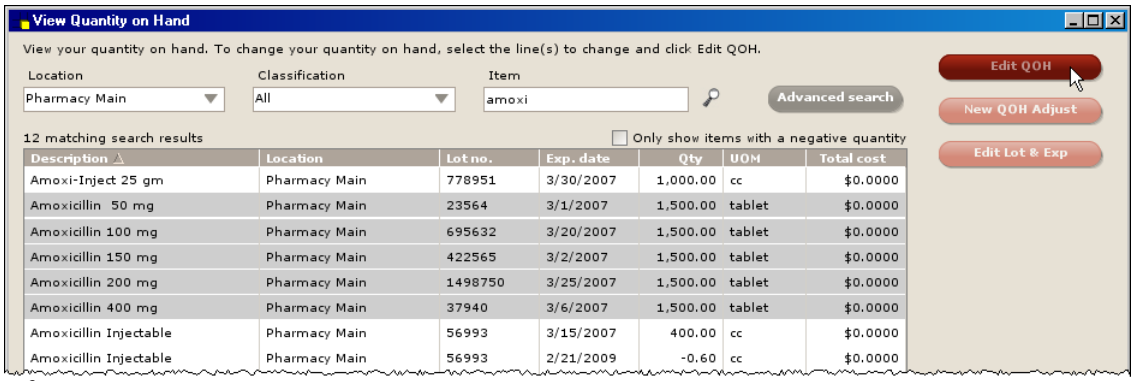
Entering a number in either the *Actual* or *Change* field will result the other to populate with the quantity modification.

Editing Quantity on Hand (QOH): In this demonstration, you will adjust the quantity on hand for Amoxicillin 50mg, 100mg, 150mg, 200mg and 400mg in the Pharmacy location.

1. Select **Inventory** > **View Quantity on Hand**.
   The *View Quantity on Hand* window displays all items marked to maintain quantity on hand.
2. Optional: Click **Advanced Search** to enter additional search information.
3. From the *Location* list, select **Pharmacy Main**. In the item field type **amoxi** and click **Search**. A list of items that match the specified criteria display.



4. Hold the **Ctrl** key and select Amoxicillin 50mg, Amoxicillin 100mg, Amoxicillin 150mg, Amoxicillin 200mg, and Amoxicillin 400mg. Click **Edit QOH.**



Description	Location	Lot no.	Exp. date	Qty	UOM	Total cost
Amoxi-Inject 25 gm	Pharmacy Main	778951	3/30/2007	1,000.00	cc	$0.0000
Amoxicillin 50 mg	Pharmacy Main	23564	3/1/2007	1,500.00	tablet	$0.0000
Amoxicillin 100 mg	Pharmacy Main	695632	3/20/2007	1,500.00	tablet	$0.0000
Amoxicillin 150 mg	Pharmacy Main	422565	3/2/2007	1,500.00	tablet	$0.0000
Amoxicillin 200 mg	Pharmacy Main	1498750	3/25/2007	1,500.00	tablet	$0.0000
Amoxicillin 400 mg	Pharmacy Main	37940	3/6/2007	1,500.00	tablet	$0.0000
Amoxicillin Injectable	Pharmacy Main	56993	3/15/2007	400.00	cc	$0.0000
Amoxicillin Injectable	Pharmacy Main	56993	2/21/2009	-0.60	cc	$0.0000

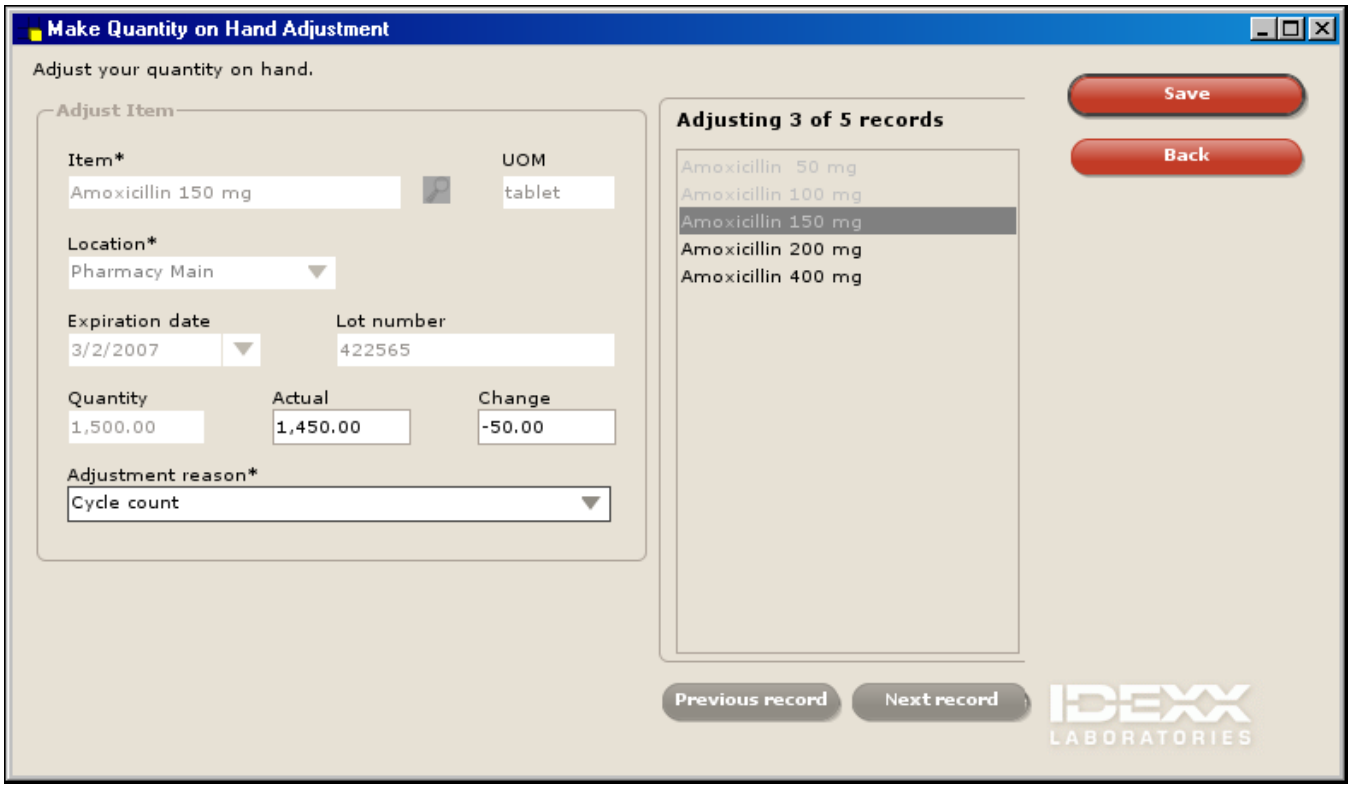
The Make Adjustment window displays the items. The first item is selected.

5. Enter a new quantity on hand of **1,450** tablets for Amoxicillin 50mg in the *Actual* field. Press **Tab** to view the *Change* quantity.
6. Select the reason for the adjustment as **Cycle count** in the *Adjustment reason* list.
7. Click **Next Record** or **Previous Record** to navigate to the next item to be adjusted.

7.1 Make any necessary changes to each of the records.

- Amoxicillin 100mg: **1327 tablets; Cycle count**
- Amoxicillin 150mg; **1489 tablets; Cycle count**
- Amoxicillin 200mg; **1527 tablets; Cycle count**
- Amoxicillin 400mg; **1440 tablets; Cycle count**

8. Click **Save**.
9. Close the *View Quantity on Hand* window.



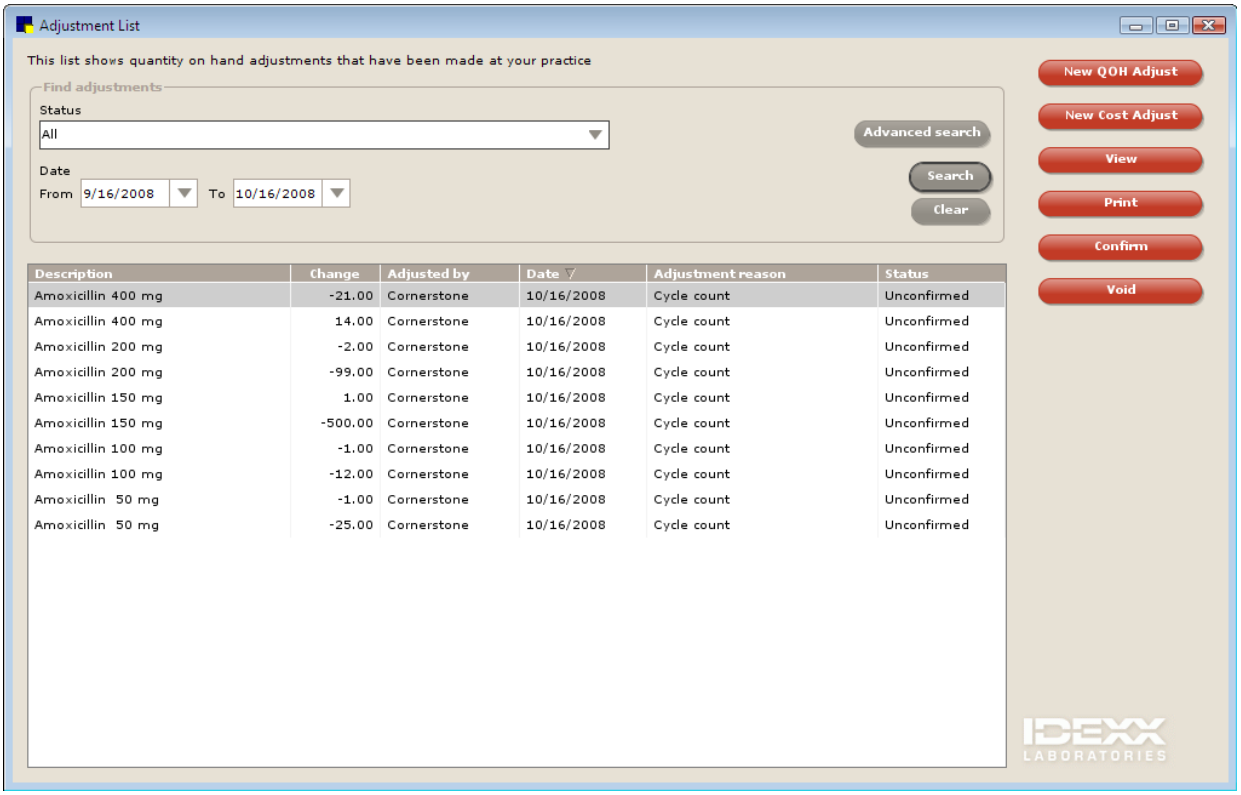
Adjustment List

This lesson highlights the *Adjustment List*.

To open the *Adjustment List* window, select **Inventory** > **Adjustment List**. The *Adjustment List* displays all quantity on hand adjustments. Cost Adjustments do not appear on the list.

If practice defaults are not set to confirm quantity on hand adjustments, each adjustment performed by other staff members in the *View Quantity on Hand* window will display on the *Adjustment List* with an **Unconfirmed** status. Adjustments can be **Confirmed** or **Voided.**

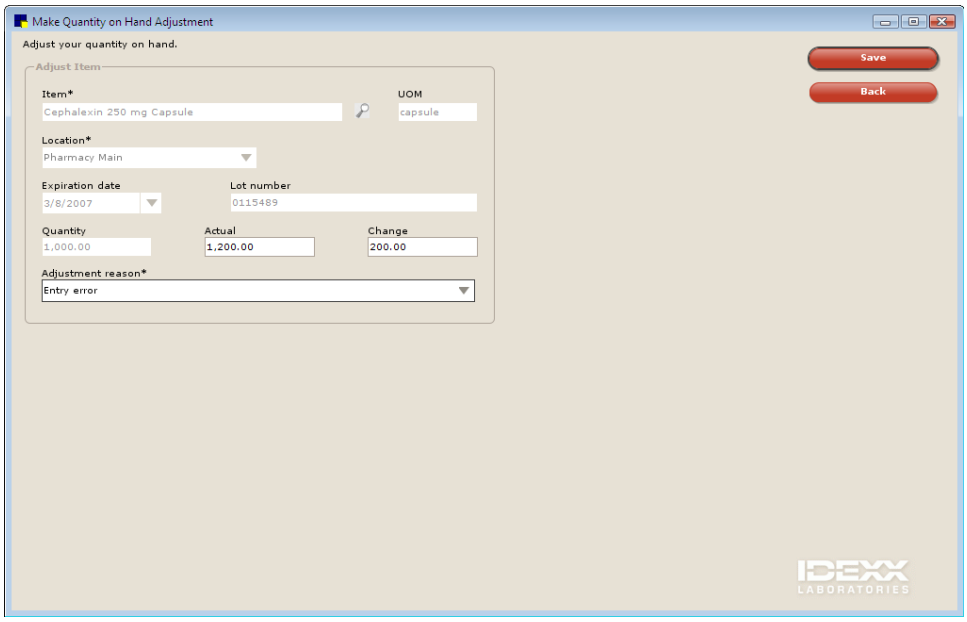
While performing a basic or advanced search, to narrow the list of items, enter criteria in any of the fields in the *Find adjustments* area and click **Search**.


Adjustment List
This list shows quantity on hand adjustments that have been made at your practice
Find adjustments
Status
All
Advanced search
Date
From 9/16/2008
To 10/16/2008
Search
Clear
New QOH Adjust
New Cost Adjust
View
Print
Confirm
Void
Description Change Adjusted by Date Adjustment reason Status
Amoxicillin 400 mg -21.00 Cornerstone 10/16/2008 Cycle count Unconfirmed
Amoxicillin 400 mg 14.00 Cornerstone 10/16/2008 Cycle count Unconfirmed
Amoxicillin 200 mg -2.00 Cornerstone 10/16/2008 Cycle count Unconfirmed
Amoxicillin 200 mg -99.00 Cornerstone 10/16/2008 Cycle count Unconfirmed
Amoxicillin 150 mg 1.00 Cornerstone 10/16/2008 Cycle count Unconfirmed
Amoxicillin 150 mg -500.00 Cornerstone 10/16/2008 Cycle count Unconfirmed
Amoxicillin 100 mg -1.00 Cornerstone 10/16/2008 Cycle count Unconfirmed
Amoxicillin 100 mg -12.00 Cornerstone 10/16/2008 Cycle count Unconfirmed
Amoxicillin 50 mg -1.00 Cornerstone 10/16/2008 Cycle count Unconfirmed
Amoxicillin 50 mg -25.00 Cornerstone 10/16/2008 Cycle count Unconfirmed
IDEXX LABORATORIES

Adjust Quantity on Hand from Adjustment List

New Quantity on Hand (QOH) Adjust: The inventory manager has completed a physical count and discovers that an item exists on the shelf, but is showing a quantity of 0 in Cornerstone*. In this demonstration, you will adjust the quantity on hand for an inventory item.

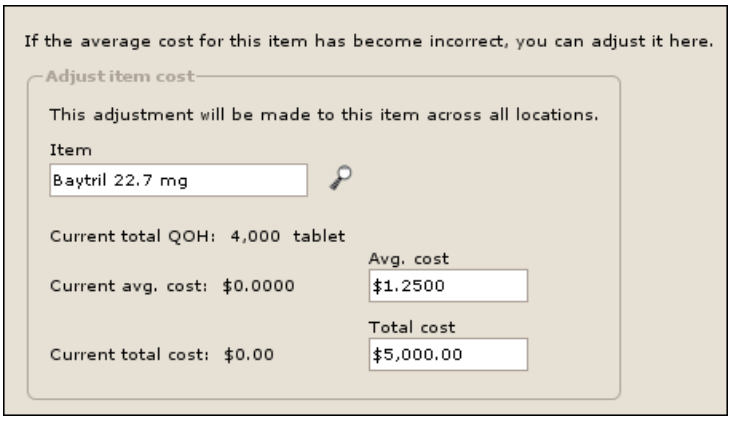
1. Select **Inventory** > **Adjustment List**.
2. Click **New QOH Adjust** and the *Make Quantity on Hand Adjustment* window displays.
3. In the *Item* field, press **F2** to search for the item.Highlight the item and click **Select**.
4. In the *Expiration date* field, if tracking, enter the expiration date for the item.
5. In the *Lot number* field, if tracking, enter the lot number for the item.
6. In the *Actual* field, enter the new quantity on hand and press **Tab**.
   - The adjusted quantity displays in the *Change* field (Ex. 200.00).
7. From the Adjustment reason list, select reason for the adjustment.
8. Click **Save**.
9. Close the *Adjustment List* window.



Adjust Vendor Cost of Item

In this demonstration, you will adjust the cost for an inventory item.

1. Select **Inventory** > **Adjustment List** and then click **New Cost Adjust**.
2. In the *Item* field search for and select an inventory item.
3. In the *Avg. cost* field, type the average unist cost of the product and press **Tab.**
   - The total cost is calculated and displays in the *Current total cost* field. As an alternative, you can also enter the total cost to automatically calculate average cost.
4. Click **Save**.
5. Close the *Adjustment List* window.


If the average cost for this item has become incorrect, you can adjust it here.
Adjust item cost
This adjustment will be made to this item across all locations.
Item
Baytril 22.7 mg
Current total QOH: 4,000 tablet
Avg. cost
Current avg. cost: $0.0000
$1.2500
Total cost
Current total cost: $0.00
$5,000.00

Other Depletion Activities: Patient Visit List, Whiteboard, Invoice, and Voids

It is important to understand how inventory quantities are depleted from Cornerstone.

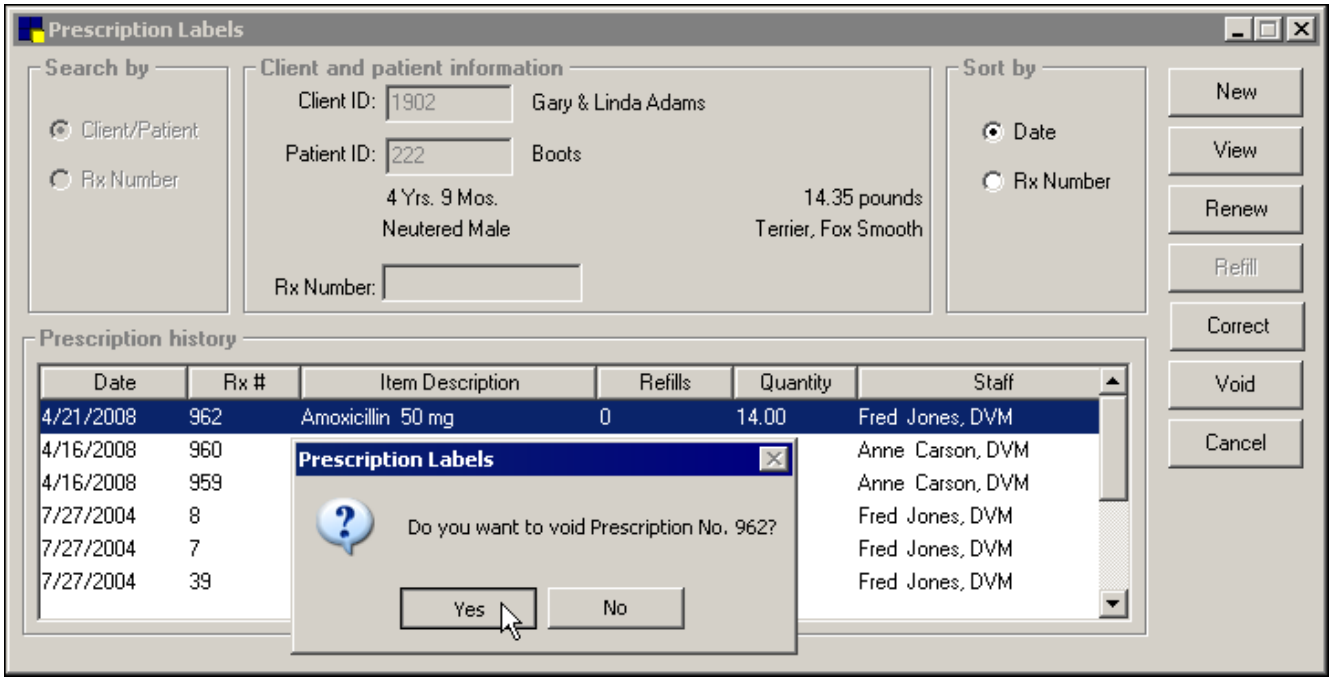
1. Patient Visit List – The Patient Visit List will only deplete inventory quantities when the item has been performed and inventory details have been verified.
2. Whiteboard – When treatments are completed on the whiteboard inventory items are performed and there is an opportunity to verify inventory details. These charges will be transferred to the Patient Visit List.
3. Invoice – Inventory quantities are depleted on saved and posted invoices when the inventory details are verified.

Voiding Prescriptions

Voiding prescriptions does three things:

1. The prescription is voided and hidden in the patient's medical record (unless **Hide voided items** check box is unchecked).
2. The quantity of the items is added back into inventory.
3. The charge is deleted from the *Patient Visit List*.

Use this step when returning prescriptions to the shelf that have not been picked up by your client.

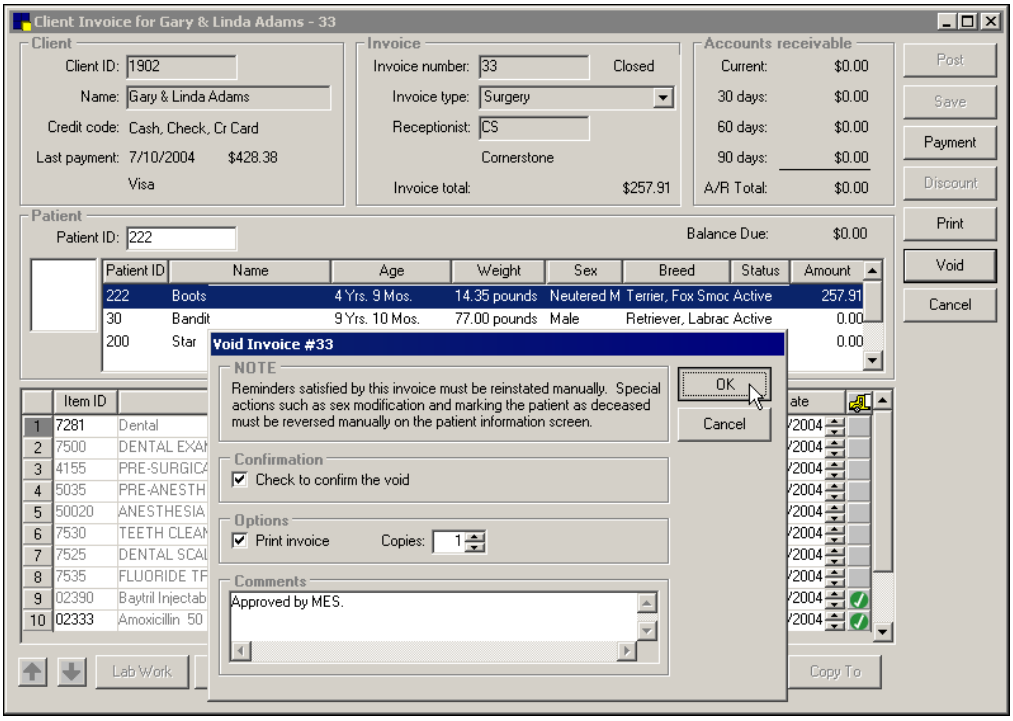


tip When using the *Patient Visit List* and declining an item to history, using the blue PVL line to record "client did not pick up prescription", is a best practice option for patient record documentation and for returning inventory to stock. Voiding the prescription would be the next step.

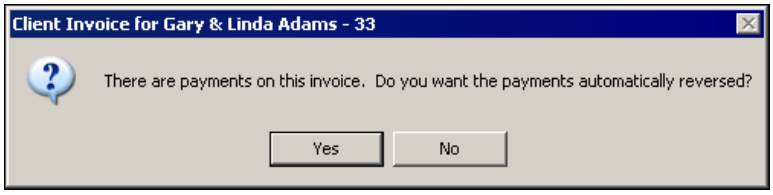
Voiding Invoices

Voiding an invoice reverses all charges on the invoice and returns the quantity of the inventory items to inventory stock.

Voiding does not reverse any special actions that were completed (ex. sex modification, mark as deceased, etc) or reminders updated during the invoicing process.



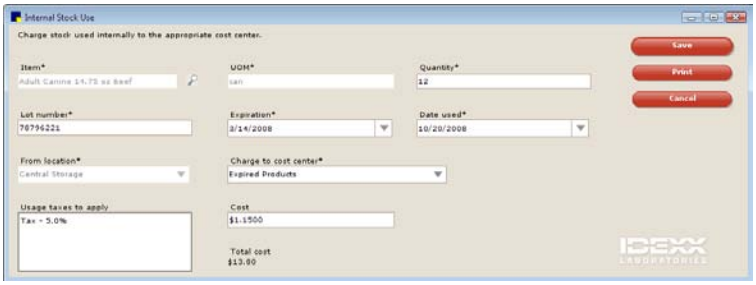
If there are payments attached to the invoice, Cornerstone will ask if you want to reverse them.


Client Invoice for Gary & Linda Adams - 33
There are payments on this invoice. Do you want the payments automatically reversed?
Yes
No

Deplete Internal Stock

To open the *Internal Stock Use*, select **Inventory > Internal Stock Use**.

Internal stock usage is considered complete when saved. An adjustment is required to reverse it.



Internal Stock Use buttons include:

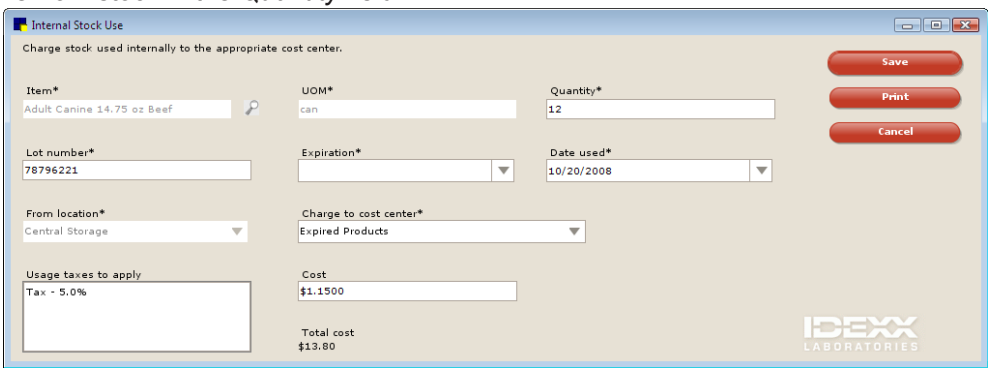
Save is used to process the depletion of stock for items used internally by the practice.

Print is used to access the *Inventory – Internal Usage Report*. Click **Print**, select sort order and range information then decide whether to preview, print or save the report. Click **Back** until the *Internal Stock Use* window displays.

Cancel is used to discontinue an internal use of stock depletion.

In this demonstration, we will perform an internal use stock transaction using an inventory item from your vendor invoice.

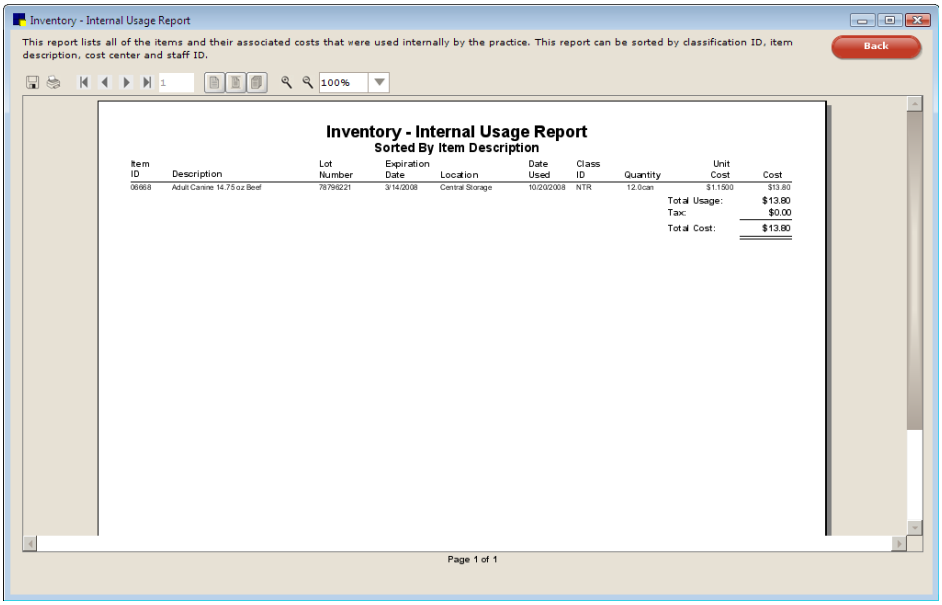
1. Select **Inventory** > **Internal Stock Use**.
2. In the *Item* field, search for and select the item to deplete.
   - The *UOM* field automatically displays the selling unit of measure for the item. The *Cost* field displays the average cost of the item if tracking quantity on hand or the last received cost if the item is not marked to maintain quantity on hand. The *Total cost* field displays the cost multiplied by the quantity entered.
3. Enter the quantity to remove from stock in the *Quantity* field.
4. If tracking, enter the lot number.
5. If tracking, enter the expiration date.
6. Enter the date the item was removed from inventory in the *Date used* list. If a date confirmation window displays, select **Yes**.



7. Select the cost center that will be charged for the item in the *Charge to cost center list*. Charge to cost center is a required field; a cost center must be selected from the list.
8. Optional: Select the usage taxes that apply to the item in the *Usage taxes to apply* list box. Taxes are listed in this box and are selected when they are highlighted.
9. Optional: Modify the unit cost of the item if necessary.
10. Click **Save**.
    - The depletion is processed.

Internal Usage Report

1. Click **Print** to view the range screen.
2. Click **Preview** to view the report.
3. Click **Back** twice to get back to the *Internal Stock Use* window.
4. Close the *Internal Stock Use* window.



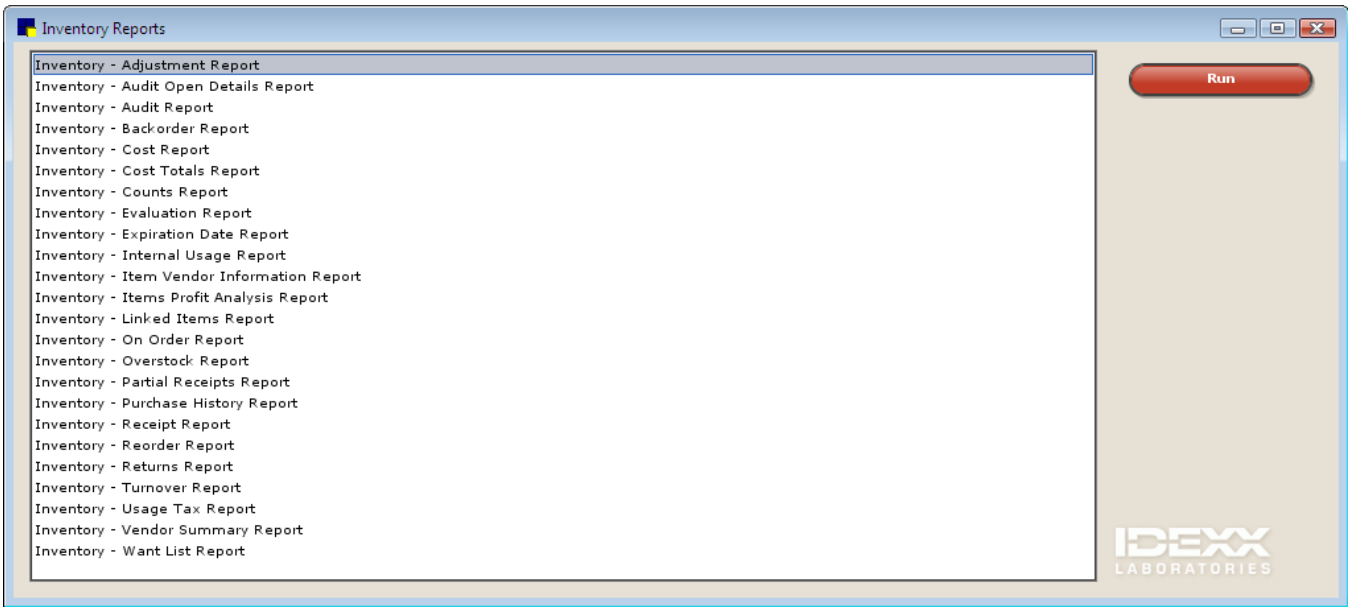
Section 6

Inventory Reports

Reports Overview

Printing Reports Overview

Access the reports by selecting **Reports > Inventory**. The *Reports* window displays the reports available.


Inventory Reports
Inventory - Adjustment Report
Inventory - Audit Open Details Report
Inventory - Audit Report
Inventory - Backorder Report
Inventory - Cost Report
Inventory - Cost Totals Report
Inventory - Counts Report
Inventory - Evaluation Report
Inventory - Expiration Date Report
Inventory - Internal Usage Report
Inventory - Item Vendor Information Report
Inventory - Items Profit Analysis Report
Inventory - Linked Items Report
Inventory - On Order Report
Inventory - Overstock Report
Inventory - Partial Receipts Report
Inventory - Purchase History Report
Inventory - Receipt Report
Inventory - Reorder Report
Inventory - Returns Report
Inventory - Turnover Report
Inventory - Usage Tax Report
Inventory - Vendor Summary Report
Inventory - Want List Report
Run
IDEXX LABORATORIES

Select the report and click **Run** to preview the report. Select the sort order and range information, if applicable, and then preview, print or save the report.

Report buttons include:

Preview is used to view a report before printing or saving it.

Print Now is used to print the report immediately to the default printer.

Print is used when you want to choose which printer the report will print to.

Back is used to return to the *Inventory Reports* window.

Remove Range is used to clear the range information in the *Set report range area* of the window.

In this demonstration, you will preview the Inventory Cost Report.

1. Select **Reports > Inventory**. The *Inventory Reports* window displays the available reports.
2. Select a report. For this demonstration, select **Inventory - Cost Report**.
3. Click **Run**. The preview window displays.
4. Optional: Arrange the report by selecting an option in the *Sort by* list. For this demonstration select **Class ID** and press **Tab**.
5. Optional: Specify the information displayed on the report by selecting range information in the *Set report range* area of the window.

   - *Description* list: Select the information to display on the report. For this demonstration select **Class ID**.
   - **Starting value**: Establish the beginning criteria that will be used to narrow the report by entering a value. Press **F2** to select from a list of options. For this demonstration type **PHA** to choose the classification: Pharmaceuticals.
   - **Ending value**: Select the ending criteria that will be used to narrow the report by entering a value. Press **F2** to select from a list of options. For this demonstration type **PHA** to choose the classification: Pharmaceuticals.
   - *And/Or* list: If the report is to include more than one search criteria, select **And** to include all the description ranges entered or select **Or** to include any of the description ranges entered. For this demonstration leave this field blank.

tip Click **Remove Range** if the information entered within the Set report range area of the window is inaccurate. This will clear the fields.

6. **Preview** or **Print** the report. For this demonstration, **Preview** the report.
7. Click **Back** until you return to the to the *Inventory Reports* window.
8. Close the *Inventory Reports* window.

The *Inventory Cost Report* does not contain items that have a zero or negative quantity or a negative cost.

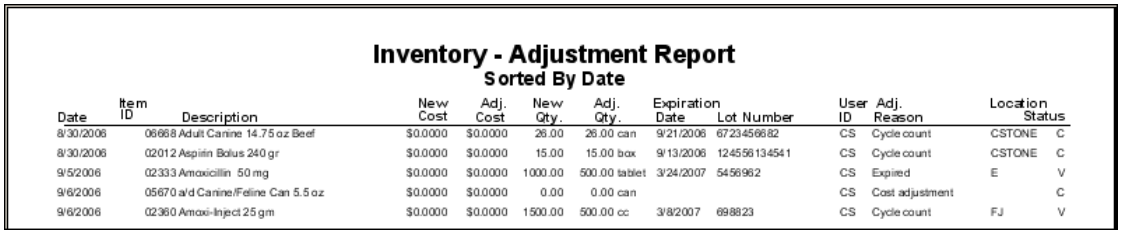
tip Reports can be saved as a .csv files then opened in Excel so that you have additional sorting options to use.

Inventory Reports

This lesson highlights the reports available in Cornerstone* Inventory.

Inventory – Adjustment Report
Use the *Inventory – Adjustment Report* to view a list of quantity or price or expiration date and lot number adjustments in inventory.

Preview Options
Sort by: Date, Item Description
Range: Adjustment Reason, Date, Item Description



Inventory - Adjustment Report
Sorted By Date

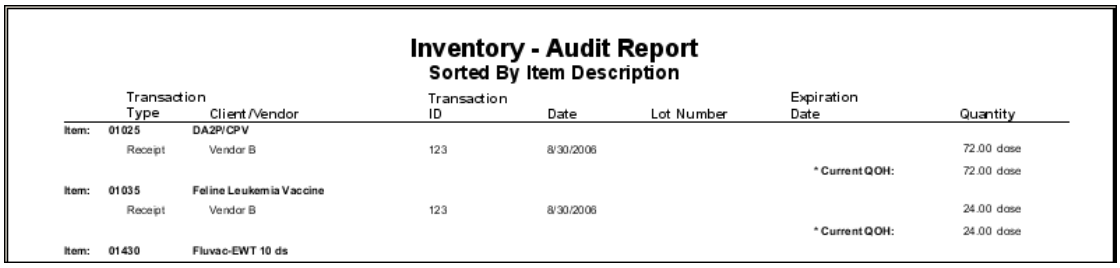
Date	Item ID	Description	New Cost	Adj. Cost	New Qty.	Adj. Qty.	Expiration Date	Lot Number	User ID	Adj. Reason	Location	Status
8/30/2006	06668	Adult Canine 14.75 oz Beef	$0.0000	$0.0000	26.00	26.00 can	9/21/2006	6723456682	CS	Cycle count	CSTONE	C
8/30/2006	02012	Aspirin Bolus 240 gr	$0.0000	$0.0000	15.00	15.00 box	9/13/2006	124556134541	CS	Cycle count	CSTONE	C
9/5/2006	02333	Amoxicillin 50 mg	$0.0000	$0.0000	1000.00	500.00 tablet	3/24/2007	5456962	CS	Expired	E	V
9/6/2006	05670	a/d Canine/Feline Can 5.5 oz	$0.0000	$0.0000	0.00	0.00 can			CS	Cost adjustment		C
9/6/2006	02360	Amoxi-Inject 25 gm	$0.0000	$0.0000	1500.00	500.00 cc	3/8/2007	698823	CS	Cycle count	FJ	V

Inventory – Audit Open Details Report
Use the *Inventory – Audit Open Items Report* to display an itemized listing of inventory items that have item details completed including location, expiration date and lot number and marked as verified but have not been finalized yet.

Preview Options
Sort by: Item Description
Range: Item Description; Item ID

Inventory – Audit Report
Use the *Inventory – Audit Report* to display an itemized listing of all inventory item transactions in Cornerstone*. This list can be used as a reference if re-keying data is necessary. When printing this report, enter ranges to filter the report to avoid printing a large report.

Preview Options
Sort by: Item Description
Range: Date Range, Item Description, Item ID

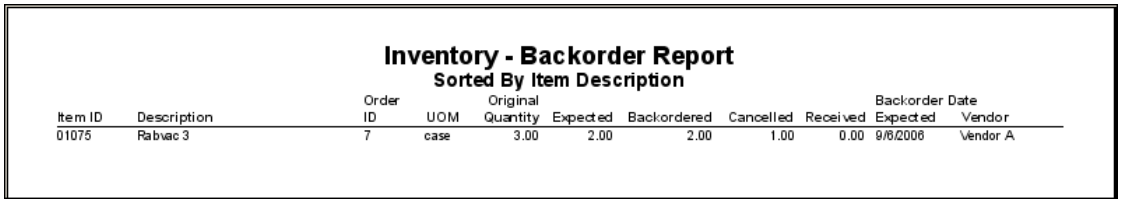


Inventory - Audit Report
Sorted By Item Description

		Transaction Type	Client/Vendor	Transaction ID	Date	Lot Number	Expiration Date	Quantity
Item:	01025	DA2P/CPV						
		Receipt	Vendor B	123	8/30/2006			72.00 dose
							* Current QOH:	72.00 dose
Item:	01035	Feline Leukemia Vaccine						
		Receipt	Vendor B	123	8/30/2006			24.00 dose
							* Current QOH:	24.00 dose
Item:	01430	Fluvac-EWT 10 ds						

Inventory – Backorder Report
Use the Inventory – Backorder Report to view all items on backorder.

Preview Options
Sort by: Item Description, Vendor Name
Range: *If sort order is by Item Description*: Item Description, Item ID, Vendor Name
If sort order is by Vendor Name: Item Description, Item ID, Vendor Name

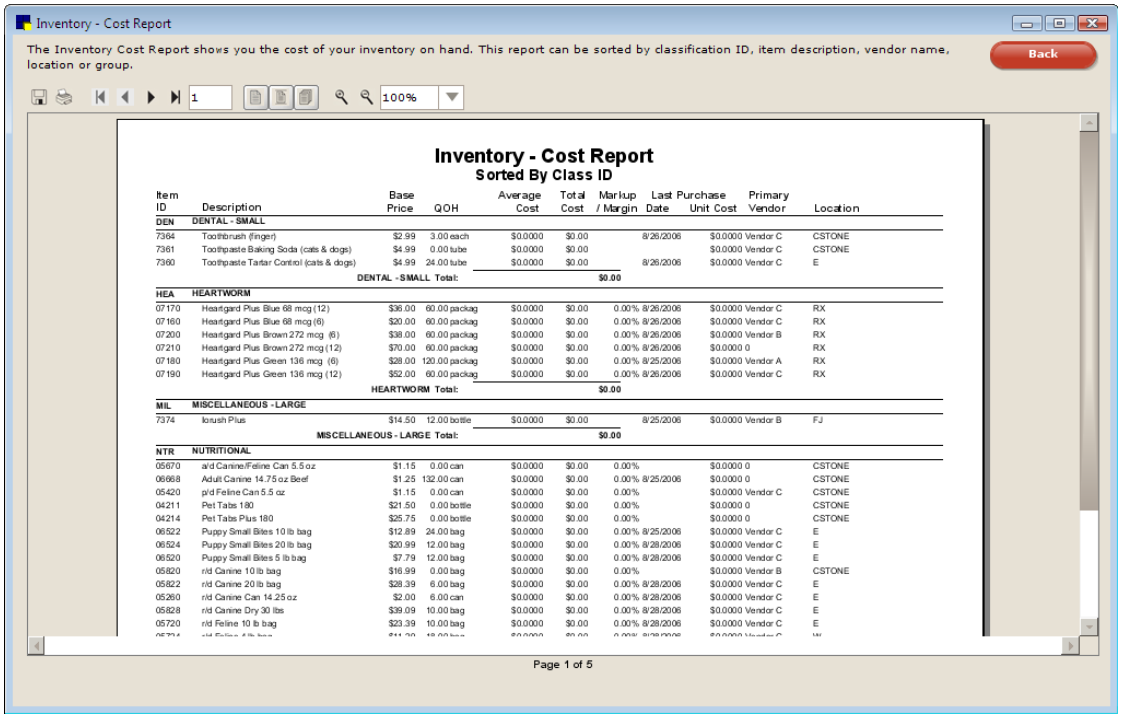


Inventory - Backorder Report
Sorted By Item Description

Item ID	Description	Order ID	UOM	Original Quantity	Expected	Backordered	Cancelled	Received	Backorder Date Expected	Vendor
01075	Rabvac 3	7	case	3.00	2.00	2.00	1.00	0.00	9/6/2006	Vendor A

Inventory – Cost Report
Use the *Inventory – Cost Report* to display the cost of inventory on hand. This is a good report to print when processing end-of-year. If the practice does not perform an EOY cycle count, print this report to obtain the value of EOY inventory information.

Preview Options
Sort by: Item Description, Class ID, Vendor Name
Range: *If Sort by is Item Description*: Item Description, Item ID
If Sort by is Class ID: Class ID, Item Description, Item ID, Subclass ID, Vendor Name
If Sort by is Vendor Name: Item Description, Item ID, Vendor Name


Inventory - Cost Report
The Inventory Cost Report shows you the cost of your inventory on hand. This report can be sorted by classification ID, item description, vendor name, location or group.
Back
100%
Inventory - Cost Report
Sorted By Class ID
Page 1 of 5

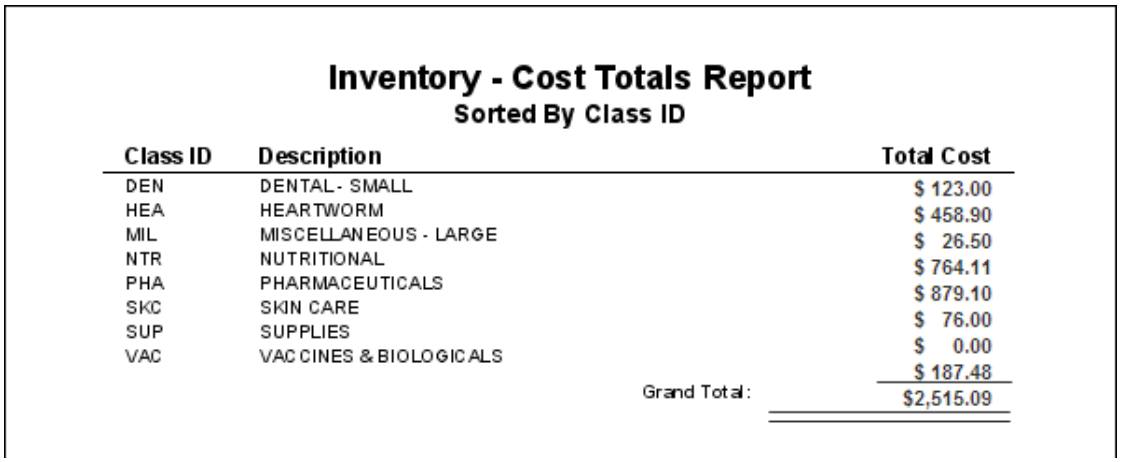
Inventory – Cost Totals Report

The *Inventory – Cost Totals Report* displays the total cost of inventory on hand summarized by item classification.

Preview Options

Sort by: Class ID

Range: *If Sort by is Class ID*: Class ID



Inventory - Cost Totals Report

Sorted By Class ID

Class ID	Description	Total Cost
DEN	DENTAL - SMALL	$ 123.00
HEA	HEARTWORM	$ 458.90
MIL	MISCELLANEOUS - LARGE	$ 26.50
NTR	NUTRITIONAL	$ 764.11
PHA	PHARMACEUTICALS	$ 879.10
SKC	SKIN CARE	$ 76.00
SUP	SUPPLIES	$ 0.00
VAC	VACCINES & BIOLOGICALS	$ 187.48
	Grand Total:	$2,515.09

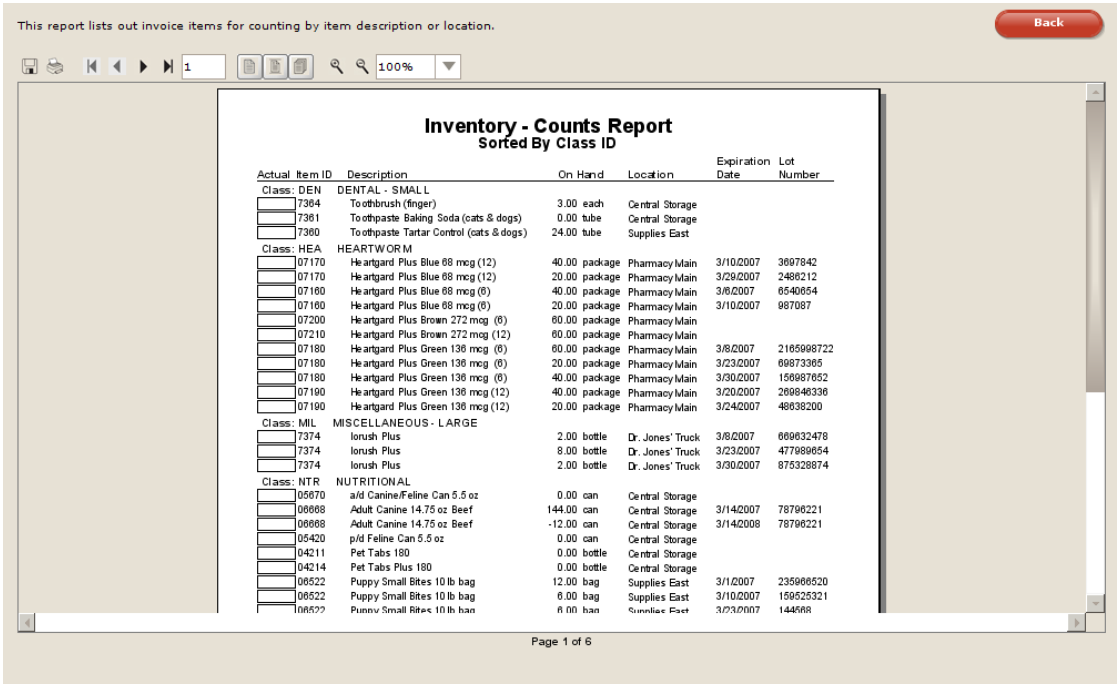
Inventory – Counts Report

Use the *Inventory – Counts Report* when performing a cycle count of inventory items marked to maintain quantity on hand. The report lists the current quantity on hand for each item and provides a space to write the actual number of items physically available for each item.

Preview Options

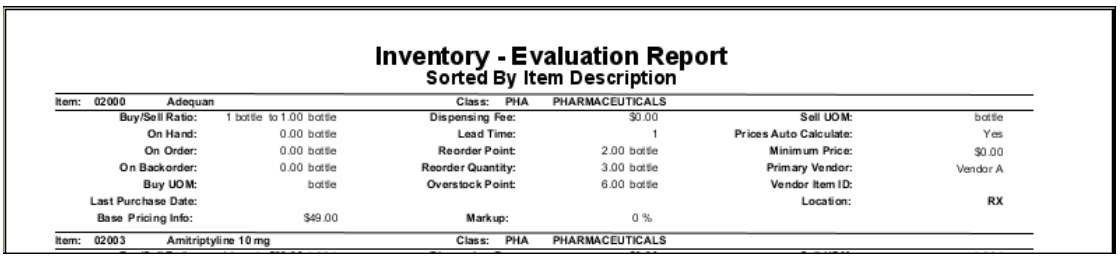
Sort by: Item Description, Location, Class ID

Range: If *Sort by* is Item Description: Class ID, Item Description, Item ID, Location
If *Sort by* is Location: Class ID, Item Description, Item ID, Location
If *Sort by* is Class ID: Class ID, Item Description, Item ID


This report lists out invoice items for counting by item description or location.
Back
100%
Inventory - Counts Report
Sorted By Class ID
Actual
Item ID
Description
On Hand
Location
Expiration Date
Lot Number
Class: DEN DENTAL - SMALL
7364 Toothbrush (finger) 3.00 each Central Storage
7361 Toothpaste Baking Soda (cats & dogs) 0.00 tube Central Storage
7360 Toothpaste Tartar Control (cats & dogs) 24.00 tube Supplies East
Class: HEA HEARTWORM
07170 Heartgard Plus Blue 68 mcg (12) 40.00 package Pharmacy Main 3/10/2007 3697842
07170 Heartgard Plus Blue 68 mcg (12) 20.00 package Pharmacy Main 3/29/2007 2486212
07160 Heartgard Plus Blue 68 mcg (6) 40.00 package Pharmacy Main 3/6/2007 6540654
07160 Heartgard Plus Blue 68 mcg (6) 20.00 package Pharmacy Main 3/10/2007 987087
07200 Heartgard Plus Brown 272 mcg (6) 60.00 package Pharmacy Main
07210 Heartgard Plus Brown 272 mcg (12) 60.00 package Pharmacy Main
07180 Heartgard Plus Green 136 mcg (6) 60.00 package Pharmacy Main 3/8/2007 2165998722
07180 Heartgard Plus Green 136 mcg (6) 20.00 package Pharmacy Main 3/23/2007 69873365
07180 Heartgard Plus Green 136 mcg (6) 40.00 package Pharmacy Main 3/30/2007 156987652
07190 Heartgard Plus Green 136 mcg (12) 40.00 package Pharmacy Main 3/20/2007 269846336
07190 Heartgard Plus Green 136 mcg (12) 20.00 package Pharmacy Main 3/24/2007 48638200
Class: MIL MISCELLANEOUS - LARGE
7374 Iorush Plus 2.00 bottle Dr. Jones' Truck 3/8/2007 669632478
7374 Iorush Plus 8.00 bottle Dr. Jones' Truck 3/23/2007 477989654
7374 Iorush Plus 2.00 bottle Dr. Jones' Truck 3/30/2007 875328874
Class: NTR NUTRITIONAL
05670 a/d Canine/Feline Can 5.5 oz 0.00 can Central Storage
06668 Adult Canine 14.75 oz Beef 144.00 can Central Storage 3/14/2007 78796221
06668 Adult Canine 14.75 oz Beef -12.00 can Central Storage 3/14/2008 78796221
05420 p/d Feline Can 5.5 oz 0.00 can Central Storage
04211 Pet Tabs 180 0.00 bottle Central Storage
04214 Pet Tabs Plus 180 0.00 bottle Central Storage
06522 Puppy Small Bites 10 lb bag 12.00 bag Supplies East 3/1/2007 235966520
06522 Puppy Small Bites 10 lb bag 6.00 bag Supplies East 3/10/2007 159525321
Page 1 of 6

Inventory – Evaluation Report
Use the *Inventory – Evaluation Report* to view information about each inventory item marked to maintain quantity on hand.

Preview Options
Sort by: Item Description, Class ID, Vendor Name
Range: *If Sorted Order is Item Description*: Class ID, Item Description
If Sort by is Class ID: Class ID, Item Description, Subclass ID
If Sort by is Vendor Name: Item Description, Vendor Name

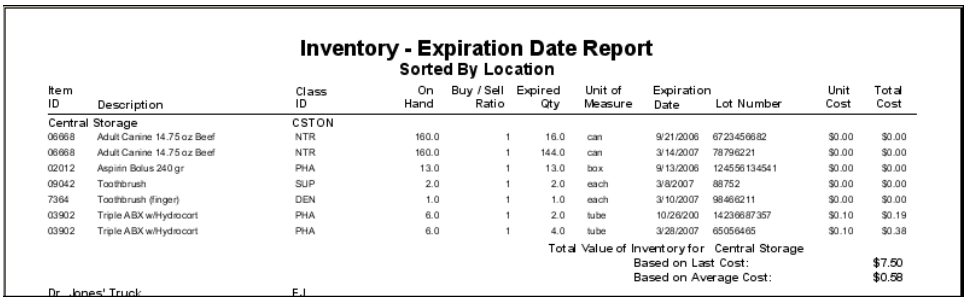


Inventory - Evaluation Report
Sorted By Item Description

Item:	02000	Adequan	Class:	PHA	PHARMACEUTICALS		
	Buy/Sell Ratio:	1 bottle to 1.00 bottle	Dispensing Fee:	$0.00	Sell UOM:	bottle	
	On Hand:	0.00 bottle	Lead Time:	1	Prices Auto Calculate:	Yes	
	On Order:	0.00 bottle	Reorder Point:	2.00 bottle	Minimum Price:	$0.00	
	On Backorder:	0.00 bottle	Reorder Quantity:	3.00 bottle	Primary Vendor:	Vendor A	
	Buy UOM:	bottle	Overstock Point:	6.00 bottle	Vendor Item ID:		
	Last Purchase Date:				Location:	RX	
	Base Pricing Info:	$49.00	Markup:	0 %			
Item:	02003	Amitriptyline 10 mg	Class:	PHA	PHARMACEUTICALS		

Inventory – Expiration Date Report
Use the *Inventory – Expiration Date Report* to view a list of inventory items that will expire before a specified date.

Preview Options
Sort by: Location, Item ID, Item Description, Class ID
Range: Class ID, Expiration Date, Item Description, Item ID, Location

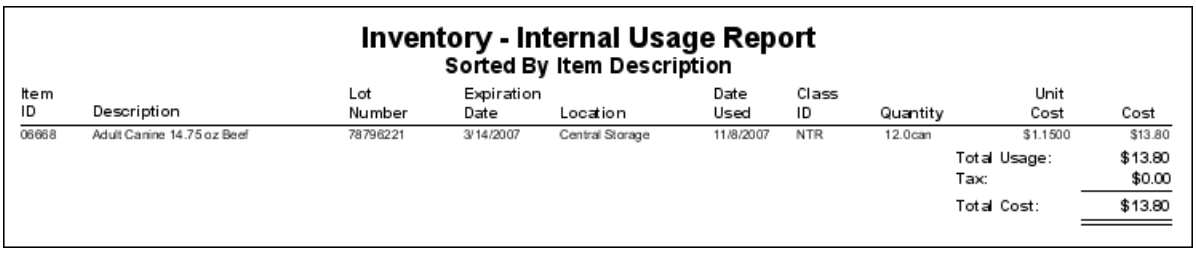


Inventory - Expiration Date Report
Sorted By Location

Item ID	Description	Class ID	On Hand	Buy / Sell Ratio	Expired Qty	Unit of Measure	Expiration Date	Lot Number	Unit Cost	Total Cost
Central Storage		CSTON								
06668	Adult Canine 14.75 oz Beef	NTR	160.0	1	16.0	can	9/21/2006	6723456682	$0.00	$0.00
06668	Adult Canine 14.75 oz Beef	NTR	160.0	1	144.0	can	3/14/2007	78796221	$0.00	$0.00
02012	Aspirin Bolus 240 gr	PHA	13.0	1	13.0	box	9/13/2006	124556134541	$0.00	$0.00
09042	Toothbrush	SUP	2.0	1	2.0	each	3/8/2007	88752	$0.00	$0.00
7364	Toothbrush (finger)	DEN	1.0	1	1.0	each	3/10/2007	98466211	$0.00	$0.00
03902	Triple ABX w/Hydrocort	PHA	6.0	1	2.0	tube	10/26/200	14236687357	$0.10	$0.19
03902	Triple ABX w/Hydrocort	PHA	6.0	1	4.0	tube	3/28/2007	65056465	$0.10	$0.38
						Total Value of Inventory for Central Storage				
						Based on Last Cost:				$7.50
						Based on Average Cost:				$0.58
Dr. Jones' Truck		FJ								

Inventory – Internal Usage Report
Use the *Inventory – Internal Usage Report* to view all the items and their associated costs that were used internally by the practice.

Preview Options
Sort by: Item Description, Class ID, Cost Center, Staff ID
Range: *If Sort by is Item Description*: Date, Item Description, Item ID
If Sort by is Class ID: Class ID, Date, Item Description, Item ID
If Sort by is Cost Center: Cost Center, Date, Item Description
If Sort by is Staff ID: Date, Item Description, Item ID, Staff ID

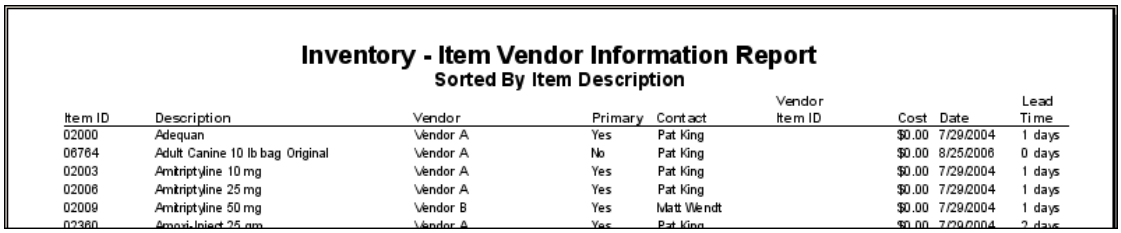


Inventory - Internal Usage Report
Sorted By Item Description

Item ID	Description	Lot Number	Expiration Date	Location	Date Used	Class ID	Quantity	Unit Cost	Cost
06668	Adult Canine 14.75 oz Beef	78796221	3/14/2007	Central Storage	11/8/2007	NTR	12.0can	$1.1500	$13.80
							Total Usage:		$13.80
							Tax:		$0.00
							Total Cost:		$13.80

Inventory – Item Vendor Information Report
Use the *Inventory – Item Vendor Information Report* to view a list of vendors and associated information assigned to inventory items through the *Invoice Item List.*

Preview Options
Sort by: Item Description, Vendor Name
Range: Item Description, Vendor Name



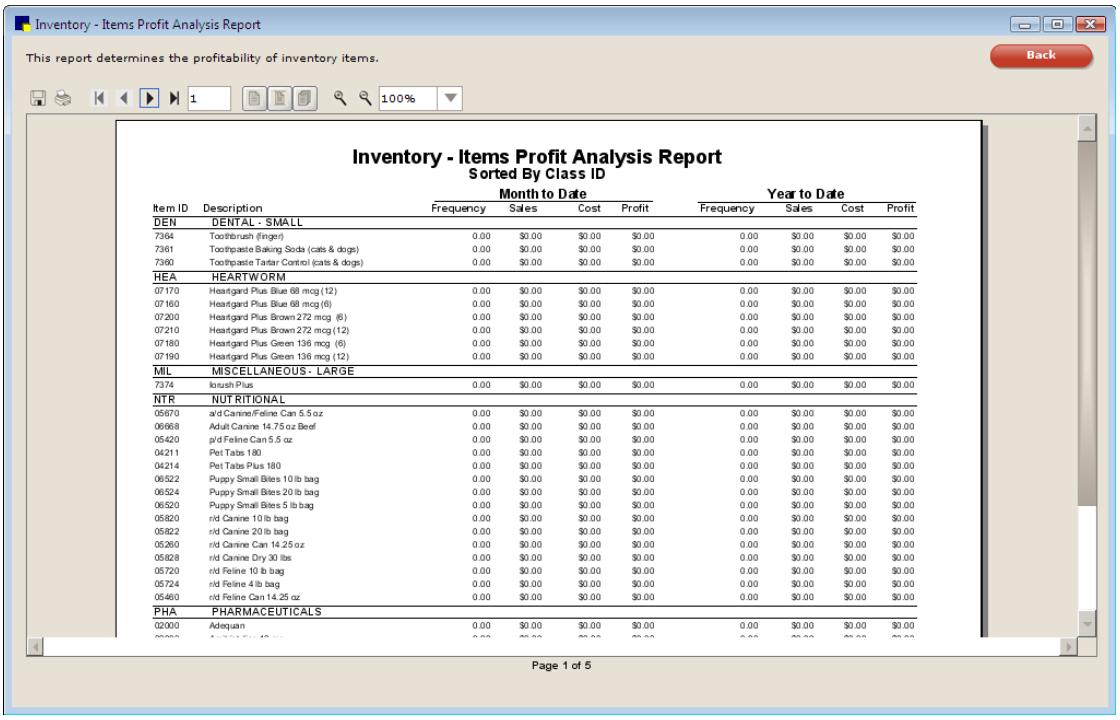
Inventory - Item Vendor Information Report
Sorted By Item Description

Item ID	Description	Vendor	Primary	Contact	Vendor Item ID	Cost	Date	Lead Time
02000	Adequan	Vendor A	Yes	Pat King		$0.00	7/29/2004	1 days
06764	Adult Canine 10 lb bag Original	Vendor A	No	Pat King		$0.00	8/25/2006	0 days
02003	Amitriptyline 10 mg	Vendor A	Yes	Pat King		$0.00	7/29/2004	1 days
02006	Amitriptyline 25 mg	Vendor A	Yes	Pat King		$0.00	7/29/2004	1 days
02009	Amitriptyline 50 mg	Vendor B	Yes	Matt Wendt		$0.00	7/29/2004	1 days
02360	Amoxi-Inject 25 gm	Vendor A	Yes	Pat King		$0.00	7/29/2004	2 days

Inventory – Items Profit Analysis Report
Use the *Inventory – Items Profit Analysis Report* to determine profitability of inventory items sold.

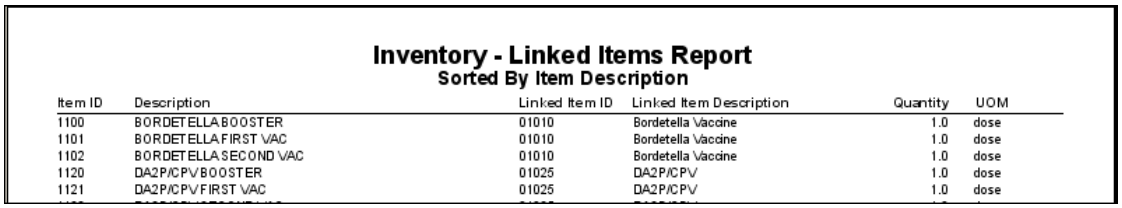
Note: End-of-month must be processed twice and end-of-year once before data displays for the appropriate columns for this report. The data in this report corresponds to the data in the *EOM Inventory Sales Report*.

Preview Options
Sort by: Class ID, Location ID, Revenue Center
Range: *If sort by is Class ID*: Class ID, Item Description, Item ID
If sort by is Location ID: Item Description, Item ID, Location ID
If sort by is Revenue Center: Item Description, Item ID, Revenue Center


Inventory - Items Profit Analysis Report
This report determines the profitability of inventory items.
Back
100%
Inventory - Items Profit Analysis Report
Sorted By Class ID
Month to Date
Year to Date
Item ID
Description
Frequency
Sales
Cost
Profit
DEN DENTAL - SMALL
7364 Toothbrush (finger)
7361 Toothpaste Baking Soda (cats & dogs)
7360 Toothpaste Tartar Control (cats & dogs)
HEA HEARTWORM
07170 Heartgard Plus Blue 68 mcg (12)
07160 Heartgard Plus Blue 68 mcg (6)
07200 Heartgard Plus Brown 272 mcg (6)
07210 Heartgard Plus Brown 272 mcg (12)
07180 Heartgard Plus Green 136 mcg (6)
07190 Heartgard Plus Green 136 mcg (12)
MIL MISCELLANEOUS - LARGE
7374 Ionush Plus
NTR NUTRITIONAL
05670 a/d Canine/Feline Can 5.5 oz
06668 Adult Canine 14.75 oz Beef
05420 p/d Feline Can 5.5 oz
04211 Pet Tabs 180
04214 Pet Tabs Plus 180
06522 Puppy Small Bites 10 lb bag
06524 Puppy Small Bites 20 lb bag
06520 Puppy Small Bites 5 lb bag
05820 r/d Canine 10 lb bag
05822 r/d Canine 20 lb bag
05260 r/d Canine Can 14.25 oz
05828 r/d Canine Dry 30 lbs
05720 r/d Feline 10 lb bag
05724 r/d Feline 4 lb bag
05460 r/d Feline Can 14.25 oz
PHA PHARMACEUTICALS
02000 Adequan
Page 1 of 5

Inventory – Linked Items Report
The *Inventory – Linked Items Report* lists all of the invoice items that have inventory items linked to them.

Preview Options
Sort by: Item Description
Range: Item Description, Item ID

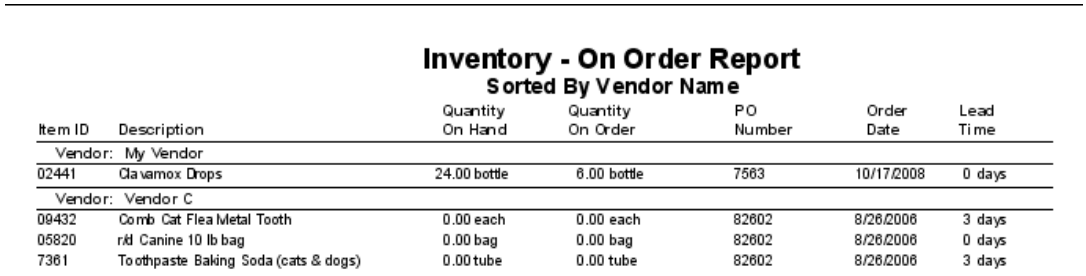


Inventory - Linked Items Report
Sorted By Item Description

Item ID	Description	Linked Item ID	Linked Item Description	Quantity	UOM
1100	BORDETELLA BOOSTER	01010	Bordetella Vaccine	1.0	dose
1101	BORDETELLA FIRST VAC	01010	Bordetella Vaccine	1.0	dose
1102	BORDETELLA SECOND VAC	01010	Bordetella Vaccine	1.0	dose
1120	DA2P/CPV BOOSTER	01025	DA2P/CPV	1.0	dose
1121	DA2P/CPV FIRST VAC	01025	DA2P/CPV	1.0	dose

Inventory – On Order Report
Use the *Inventory – On Order Report* to view detailed order information for items currently on order.

Preview Options
Sort by: Vendor Name, Item Description, Class ID
Range: *If Sort by is Vendor Name*: Item Description, Vendor Name
If Sort by is Item Description: Item Description, Vendor Name
If Sort by is Class ID: Class ID, Item Description, Vendor Name



Inventory - On Order Report
Sorted By Vendor Name

Item ID	Description	Quantity On Hand	Quantity On Order	PO Number	Order Date	Lead Time
Vendor: My Vendor						
02441	Clavamox Drops	24.00 bottle	6.00 bottle	7563	10/17/2008	0 days
Vendor: Vendor C						
09432	Comb Cat Flea Metal Tooth	0.00 each	0.00 each	82602	8/26/2006	3 days
05820	rld Canine 10 lb bag	0.00 bag	0.00 bag	82602	8/26/2006	0 days
7361	Toothpaste Baking Soda (cats & dogs)	0.00 tube	0.00 tube	82602	8/26/2006	3 days

Inventory – Overstock Report

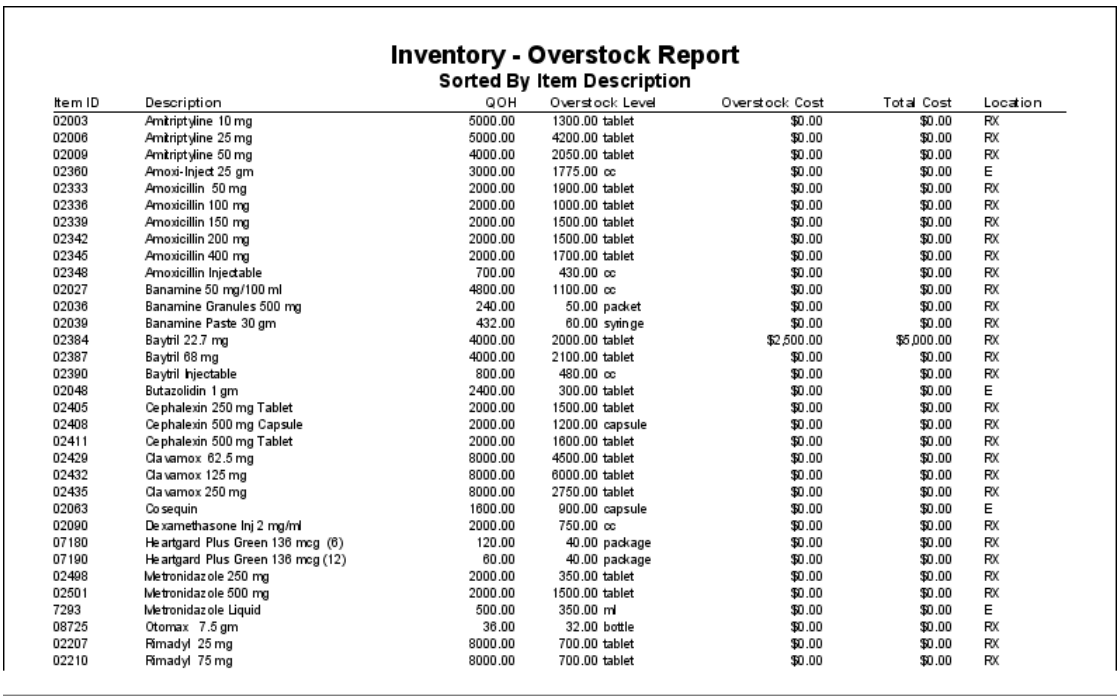
The *Inventory – Overstock Report* displays a list of inventory items that are above their overstock point, according to reorder information set up at the practice.

Preview Options

Sort by: Item Description, Class ID

Range: *If Sort by is Item Description*: Item Description

If Sort by is Class ID: Class ID, Item Description



Inventory - Overstock Report

Sorted By Item Description

Item ID	Description	QOH	Overstock Level	Overstock Cost	Total Cost	Location
02003	Amitriptyline 10 mg	5000.00	1300.00 tablet	$0.00	$0.00	RX
02006	Amitriptyline 25 mg	5000.00	4200.00 tablet	$0.00	$0.00	RX
02009	Amitriptyline 50 mg	4000.00	2050.00 tablet	$0.00	$0.00	RX
02360	Amoxi-Inject 25 gm	3000.00	1775.00 cc	$0.00	$0.00	E
02333	Amoxicillin 50 mg	2000.00	1900.00 tablet	$0.00	$0.00	RX
02336	Amoxicillin 100 mg	2000.00	1000.00 tablet	$0.00	$0.00	RX
02339	Amoxicillin 150 mg	2000.00	1500.00 tablet	$0.00	$0.00	RX
02342	Amoxicillin 200 mg	2000.00	1500.00 tablet	$0.00	$0.00	RX
02345	Amoxicillin 400 mg	2000.00	1700.00 tablet	$0.00	$0.00	RX
02348	Amoxicillin Injectable	700.00	430.00 cc	$0.00	$0.00	RX
02027	Banamine 50 mg/100 ml	4800.00	1100.00 cc	$0.00	$0.00	RX
02036	Banamine Granules 500 mg	240.00	50.00 packet	$0.00	$0.00	RX
02039	Banamine Paste 30 gm	432.00	60.00 syringe	$0.00	$0.00	RX
02384	Baytril 22.7 mg	4000.00	2000.00 tablet	$2,500.00	$5,000.00	RX
02387	Baytril 68 mg	4000.00	2100.00 tablet	$0.00	$0.00	RX
02390	Baytril Injectable	800.00	480.00 cc	$0.00	$0.00	RX
02048	Butazolidin 1 gm	2400.00	300.00 tablet	$0.00	$0.00	E
02405	Cephalexin 250 mg Tablet	2000.00	1500.00 tablet	$0.00	$0.00	RX
02408	Cephalexin 500 mg Capsule	2000.00	1200.00 capsule	$0.00	$0.00	RX
02411	Cephalexin 500 mg Tablet	2000.00	1600.00 tablet	$0.00	$0.00	RX
02429	Clavamox 62.5 mg	8000.00	4500.00 tablet	$0.00	$0.00	RX
02432	Clavamox 125 mg	8000.00	6000.00 tablet	$0.00	$0.00	RX
02435	Clavamox 250 mg	8000.00	2750.00 tablet	$0.00	$0.00	RX
02063	Cosequin	1600.00	900.00 capsule	$0.00	$0.00	E
02090	Dexamethasone Inj 2 mg/ml	2000.00	750.00 cc	$0.00	$0.00	RX
07180	Heartgard Plus Green 136 mcg (6)	120.00	40.00 package	$0.00	$0.00	RX
07190	Heartgard Plus Green 136 mcg (12)	60.00	40.00 package	$0.00	$0.00	RX
02498	Metronidazole 250 mg	2000.00	350.00 tablet	$0.00	$0.00	RX
02501	Metronidazole 500 mg	2000.00	1500.00 tablet	$0.00	$0.00	RX
7293	Metronidazole Liquid	500.00	350.00 ml	$0.00	$0.00	E
08725	Otomax 7.5 gm	36.00	32.00 bottle	$0.00	$0.00	RX
02207	Rimadyl 25 mg	8000.00	700.00 tablet	$0.00	$0.00	RX
02210	Rimadyl 75 mg	8000.00	700.00 tablet	$0.00	$0.00	RX

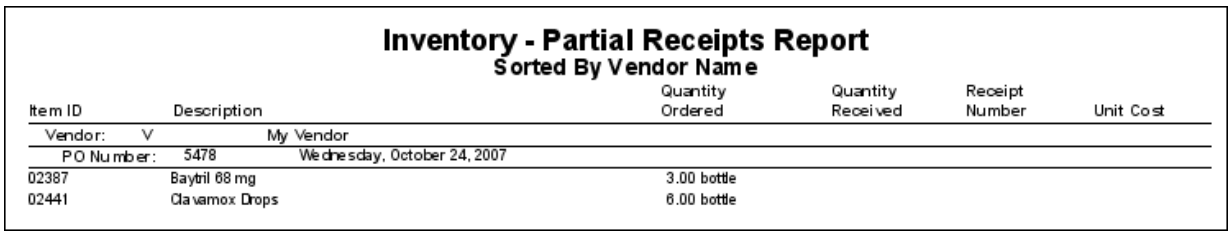
Inventory – Partial Receipts Report

The *Inventory – Partial Receipts Report* lists orders that have been partially filled but remain open because some items on the order have not been received yet.

Preview Options

Sort by: Vendor Name

Range: Date, Item Description, PO Number, Vendor Name



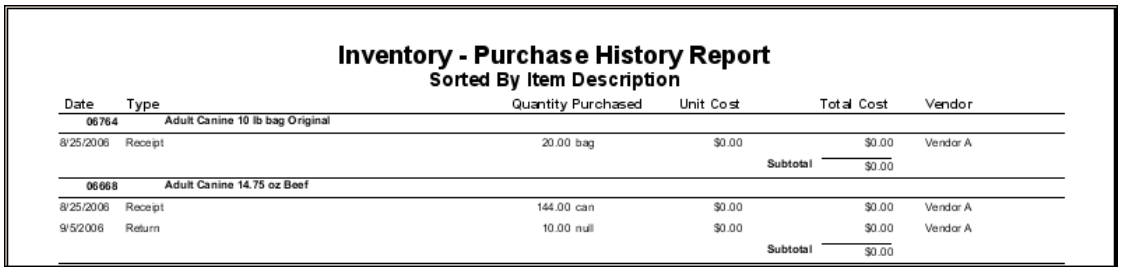
Inventory - Partial Receipts Report

Sorted By Vendor Name

Item ID	Description	Quantity Ordered	Quantity Received	Receipt Number	Unit Cost
Vendor: V	My Vendor				
PO Number: 5478	Wednesday, October 24, 2007				
02387	Baytril 68 mg	3.00 bottle			
02441	Clavamox Drops	6.00 bottle			

Inventory – Purchase History Report
Use the *Inventory – Purchase History Report* to view a list of past vendor transactions, including the receipt and return of inventory items, for the practice.

Preview Options
Sort by: Item Description, Class ID, Vendor Name, Vendor by Order, Vendor by Reciept.
Range: *If Sort by is Item Description*: Date, Item Description, Item ID
If Sort by is Class ID: Class ID, Date, Item Description, Item ID
If Sort by is Vendor Name: Item Description, Vendor Name
If Sort by is Vendor by Order: Item Description, PO Number, Vendor Name
If Sort by is Vendor by Receipt: Item Description, Receipt Number, Vendor Name

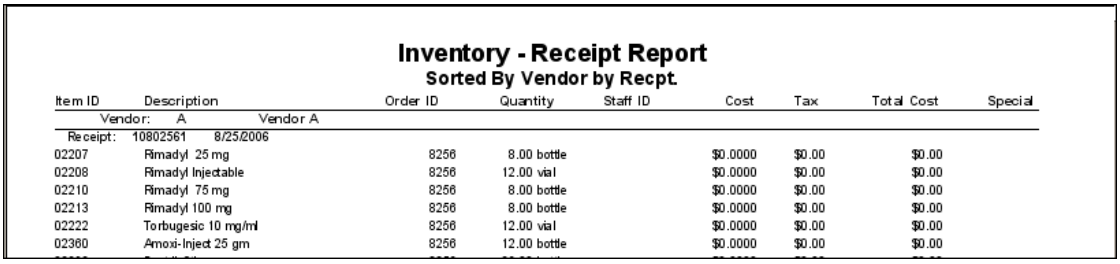


Inventory - Purchase History Report
Sorted By Item Description

Date	Type	Quantity Purchased	Unit Cost		Total Cost	Vendor
06764	**Adult Canine 10 lb bag Original**					
8/25/2006	Receipt	20.00 bag	$0.00		$0.00	Vendor A
				Subtotal	$0.00	
06668	**Adult Canine 14.75 oz Beef**					
8/25/2006	Receipt	144.00 can	$0.00		$0.00	Vendor A
9/5/2006	Return	10.00 null	$0.00		$0.00	Vendor A
				Subtotal	$0.00	

Inventory – Receipt Report
Use the *Inventory – Receipt Report* to view detailed information about items the practice has received.

Preview Options
Sort by: Vendor by Receipt.
Range: Item ID, Receipt Date, Receipt Number, Vendor Name



Inventory - Receipt Report
Sorted By Vendor by Recpt.

Item ID	Description	Order ID	Quantity	Staff ID	Cost	Tax	Total Cost	Special
Vendor: A Vendor A								
Receipt: 10802561 8/25/2006								
02207	Rimadyl 25 mg	8256	8.00 bottle		$0.0000	$0.00	$0.00	
02208	Rimadyl Injectable	8256	12.00 vial		$0.0000	$0.00	$0.00	
02210	Rimadyl 75 mg	8256	8.00 bottle		$0.0000	$0.00	$0.00	
02213	Rimadyl 100 mg	8256	8.00 bottle		$0.0000	$0.00	$0.00	
02222	Torbugesic 10 mg/ml	8256	12.00 vial		$0.0000	$0.00	$0.00	
02360	Amoxi-Inject 25 gm	8256	12.00 bottle		$0.0000	$0.00	$0.00	

Inventory – Reorder Report

Use the *Inventory – Reorder Report* to view a list of inventory item, marked to maintain quantity on hand that are at or below their reorder points. This report contains the same information that displays on the *Purchasing Work List*.

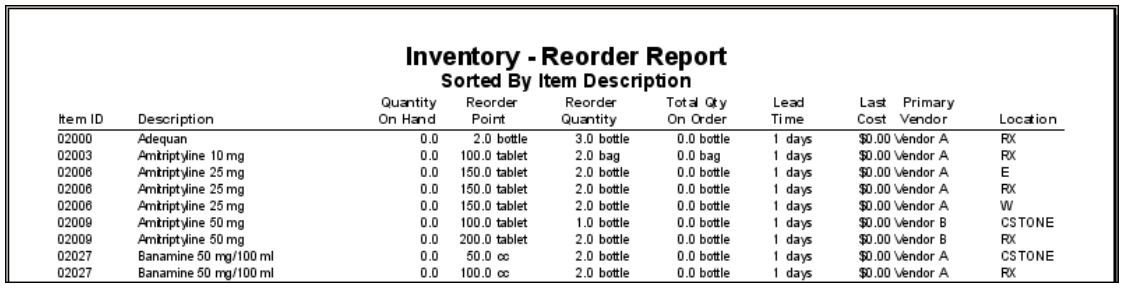
Preview Options

Sort by: Item Description, Vendor Name, Class ID

Range: *If Sort by is Item Description*: Item Description, Item ID

If Sort by is Vendor Name: Item Description, Item ID, Vendor Name

If Sort by is Class ID: Class ID, Item Description, Item ID



Inventory - Reorder Report
Sorted By Item Description

Item ID	Description	Quantity On Hand	Reorder Point	Reorder Quantity	Total Qty On Order	Lead Time	Last Cost	Primary Vendor	Location
02000	Adequan	0.0	2.0 bottle	3.0 bottle	0.0 bottle	1 days	$0.00	Vendor A	RX
02003	Amitriptyline 10 mg	0.0	100.0 tablet	2.0 bag	0.0 bag	1 days	$0.00	Vendor A	RX
02006	Amitriptyline 25 mg	0.0	150.0 tablet	2.0 bottle	0.0 bottle	1 days	$0.00	Vendor A	E
02006	Amitriptyline 25 mg	0.0	150.0 tablet	2.0 bottle	0.0 bottle	1 days	$0.00	Vendor A	RX
02006	Amitriptyline 25 mg	0.0	150.0 tablet	2.0 bottle	0.0 bottle	1 days	$0.00	Vendor A	W
02009	Amitriptyline 50 mg	0.0	100.0 tablet	1.0 bottle	0.0 bottle	1 days	$0.00	Vendor B	CSTONE
02009	Amitriptyline 50 mg	0.0	200.0 tablet	2.0 bottle	0.0 bottle	1 days	$0.00	Vendor B	RX
02027	Banamine 50 mg/100 ml	0.0	50.0 cc	2.0 bottle	0.0 bottle	1 days	$0.00	Vendor A	CSTONE
02027	Banamine 50 mg/100 ml	0.0	100.0 cc	2.0 bottle	0.0 bottle	1 days	$0.00	Vendor A	RX

Inventory – Returns Report

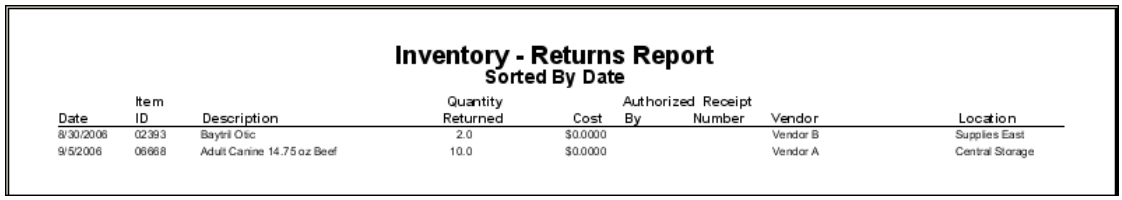
The Inventory – Returns Report lists all of the items that have been returned to a vendor.

Preview Options

Sort by: Date, Vendor Name

Range: *If sort by is Date*: Date, Item Description, Vendor Name

If sort by is Vendor Name: Item Description, Item ID, Vendor Name



Inventory - Returns Report
Sorted By Date

Date	Item ID	Description	Quantity Returned	Cost	Authorized By	Receipt Number	Vendor	Location
8/30/2006	02393	Baytril Otic	2.0	$0.0000			Vendor B	Supplies East
9/5/2006	08668	Adult Canine 14.75 oz Beef	10.0	$0.0000			Vendor A	Central Storage

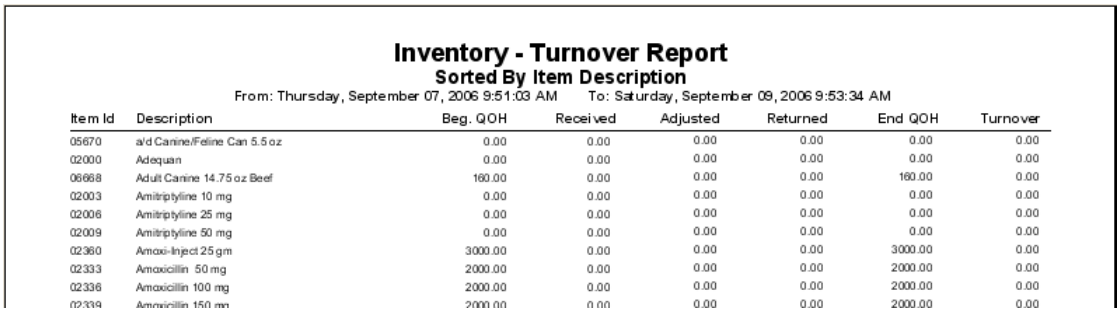
Inventory – Turnover Report
The *Inventory - Turnover Report* helps track how many times inventory completes a cycle of being received or sold. Use the ratios to adjust purchase patterns and to help optimize cash flow.

Note: The ratio that displays is the amount of the item depletion divided by the item's average quantity on hand. The validity of the report depends on the accuracy of the QOH. If receipts, returns, and internal usage are not used correctly, the turnover ratio may not be accurate.

On the *Inventory – Turnover Report* preview window, select the Beginning Period Date Processed and the Ending Period Date Processed to calculate the turnover ratio for the specified months date range. Click **OK**. The *Set report range* area displays. If applicable, select a range of information and then preview or print the report.

Note: End-of-month (EOM) must be processed to have date selections.

Preview Options
Sort by: Item Description, Class ID
Range: Beginning Period Date Processed, Ending Period Date Processed



Inventory - Turnover Report
Sorted By Item Description
From: Thursday, September 07, 2006 9:51:03 AM To: Saturday, September 09, 2006 9:53:34 AM

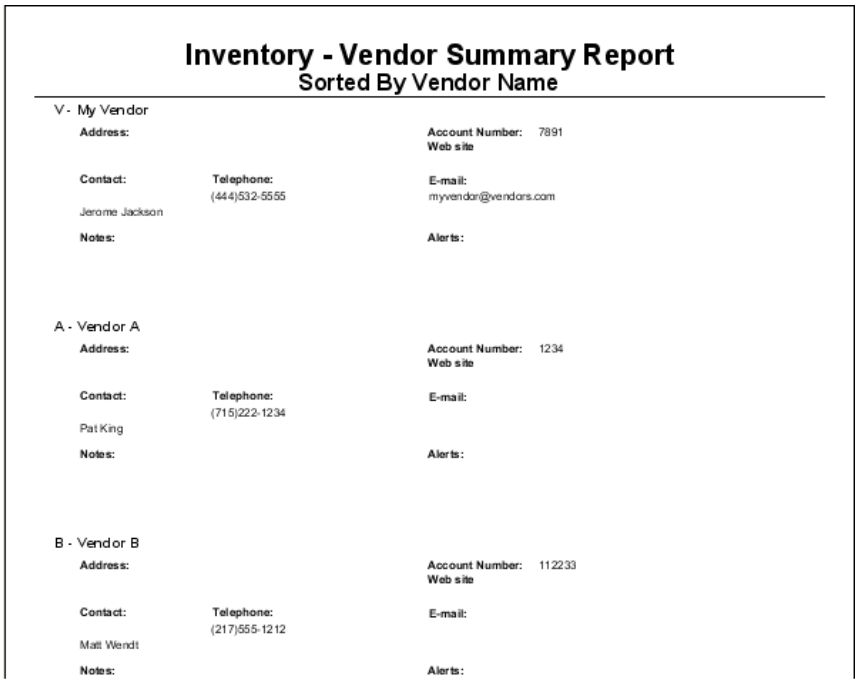
Item Id	Description	Beg. QOH	Received	Adjusted	Returned	End QOH	Turnover
05670	a/d Canine/Feline Can 5.5 oz	0.00	0.00	0.00	0.00	0.00	0.00
02000	Adequan	0.00	0.00	0.00	0.00	0.00	0.00
06668	Adult Canine 14.75 oz Beef	160.00	0.00	0.00	0.00	160.00	0.00
02003	Amitriptyline 10 mg	0.00	0.00	0.00	0.00	0.00	0.00
02006	Amitriptyline 25 mg	0.00	0.00	0.00	0.00	0.00	0.00
02009	Amitriptyline 50 mg	0.00	0.00	0.00	0.00	0.00	0.00
02360	Amoxi-Inject 25 gm	3000.00	0.00	0.00	0.00	3000.00	0.00
02333	Amoxicillin 50 mg	2000.00	0.00	0.00	0.00	2000.00	0.00
02336	Amoxicillin 100 mg	2000.00	0.00	0.00	0.00	2000.00	0.00
02339	Amoxicillin 150 mg	2000.00	0.00	0.00	0.00	2000.00	0.00

Inventory – Usage Tax Report
Some states require practices to pay taxes on items used internally. Use the *Inventory – Usage Tax Report* to show the cumulative amount of tax owed based on internal use.

Preview Options
Sort by: Date
Range: Date

Inventory – Vendor Summary Report
Use the *Inventory – Vendor Summary Report* to view the detailed information about the vendors that are set up.

Preview Options
Sort by Vendor Name
Range: Vendor Name



Inventory - Vendor Summary Report
Sorted By Vendor Name

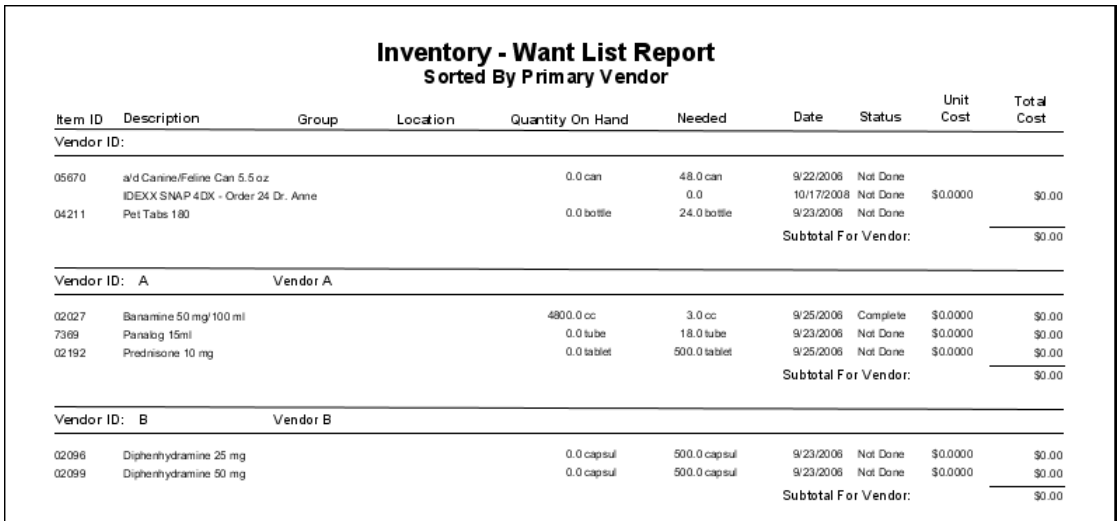
V - My Vendor
Address: | Account Number: 7891 | Web site
Contact: Jerome Jackson | Telephone: (444)532-5555 | E-mail: myvendor@vendors.com
Notes: | Alerts:

A - Vendor A
Address: | Account Number: 1234 | Web site
Contact: Pat King | Telephone: (715)222-1234 | E-mail:
Notes: | Alerts:

B - Vendor B
Address: | Account Number: 112233 | Web site
Contact: Matt Wendt | Telephone: (217)555-1212 | E-mail:
Notes: | Alerts:

Inventory – Want List Report
Use the *Inventory – Want List Report* to view details of items currently on the *Want List*.

Preview Options
Sort by: Item Description, Item ID, Primary Vendor
Range: *If Sort by is Item Description*: Item Description, Item ID, Status
If Sort by is Item ID: Item Description, Item ID, Status
If Sort by is Primary Vendor: Item Description, Status, Vendor Name



Inventory - Want List Report
Sorted By Primary Vendor

Item ID	Description	Group	Location	Quantity On Hand	Needed	Date	Status	Unit Cost	Total Cost
Vendor ID:									
05670	a/d Canine/Feline Can 5.5 oz			0.0 can	48.0 can	9/22/2006	Not Done		
	IDEXX SNAP 4DX - Order 24 Dr. Anne				0.0	10/17/2008	Not Done	$0.0000	$0.00
04211	Pet Tabs 180			0.0 bottle	24.0 bottle	9/23/2006	Not Done		
						Subtotal For Vendor:			$0.00
Vendor ID: A		Vendor A							
02027	Banamine 50 mg/100 ml			4800.0 cc	3.0 cc	9/25/2006	Complete	$0.0000	$0.00
7369	Panalog 15ml			0.0 tube	18.0 tube	9/23/2006	Not Done	$0.0000	$0.00
02192	Prednisone 10 mg			0.0 tablet	500.0 tablet	9/25/2006	Not Done	$0.0000	$0.00
						Subtotal For Vendor:			$0.00
Vendor ID: B		Vendor B							
02096	Diphenhydramine 25 mg			0.0 capsul	500.0 capsul	9/23/2006	Not Done	$0.0000	$0.00
02099	Diphenhydramine 50 mg			0.0 capsul	500.0 capsul	9/23/2006	Not Done	$0.0000	$0.00
						Subtotal For Vendor:			$0.00

Section 7

Skill Assessment & Training Evaluation

Single Location Inventory
Skill Assessment for Cornerstone 8.1

Practice Name: _____

Your Name: _____

Completion Date: _____

Instructions: After completing your training, please read each of the following skill assessment statements and evaluate your ability to perform each task. Mark only one "x" for each skill statement.

When complete, please fax this Skill Assessment and Knowledge Check to the Education Department at 715-855-7482 to receive your certificate of completion for the Cornerstone Inventory - Advanced Using course.

	Can't Perform	Can Perform With or Without Resources	N/A for my Position
Section 1 - Introduction			
1. I can access Help.			
2. I can locate Cornerstone Reference manuals.			
3. I can access online customer support.			
Section 2 - Getting Started: Phases and Setup			
4. I understand the inventory workflow.			
5. I can list inventory decisions that need to be made prior to invoice item inventory setup.			
6. I can access Cornerstone Inventory.			
7. I can add/modify vendors.			
8. I can add/modify locations.			
9. I can add/modify cost centers.			
10. I can add/modify adjustment reasons.			
11. I can perform modifications to multiple inventory items at one time (reorder information, track expiration dates or lot numbers).			
12. I can perform modifications to individual inventory items (buy/sell ratio, maintain QOH, reorder information, etc.).			
13. I can maintain inventory defaults.			
Section 3 - Purchase			
14. I can add an item to the *Want List*.			
15. I can use the **Suggested items** check box on the *Purchasing Work List* to view inventory items that need to be reordered.			
16. I can perform a basic search for an inventory item.			
17. I can perform an advanced search for an inventory item.			
18. I can arrange and adjust the columns on an *Inventory* window.			
19. I can view Item History and Item Information for an inventory item.			
20. I can delete an item from the *Want List*.			
21. I can use the *Purchasing Work List* to add an item to a purchase order.			
22. I can create a purchase order using the *Order List*.			
23. I can modify a purchase order using the *Order List*.			

Section 4 - Receive			
24. I can receive an order.			
25. I can modify an inventory receipt.			
26. I can post an inventory receipt.			
27. I can edit backordered items.			
28. I can return an item to the vendor.			
Section 5 - Deplete/Adjust/Move			
29. I can edit Expiration dates and lot number.			
30. I can adjust quantity on hand.			
31. I can adjust an item's cost.			
32. I can identify features that deplete an item's quantity.			
33. I can utilize internal stock use.			
Section 6 - Inventory Reports			
34. I can access the Inventory Reports window.			
35. can print an inventory report.			
36. I can access the *Inventory Reports* window.			
37. I can print an Inventory report.			

Results of skill assessment

_____ Total N/A _____ Total Can't Perform _____ Total Can Perform

Reminder: Please fax this assessment to the Education Department at 715-855-7482 to receive your certificate of completion for the Cornerstone Inventory - Advanced Using Course.

If you'd prefer, you can mail this information to:

IDEXX Computer Systems Education Department
2536 Alpine Road
Eau Claire, WI 54701

IDEXX **Cornerstone** Training Evaluation

Cornerstone 8.1 Single Location Inventory Training Evaluation

We Value Your Opinion! - Tell us what you think about the Single Location Inventory training.

Practice: _____ Date: _____

Trainer: _____

Feedback received from you regarding the training is vital to our continued improvement.

Description

This Single Location Inventory training is designed for inventory managers at all levels, whether you are just getting started or want to maximize utilization. You'll learn:

- Inventory Assessment and Goals
- Inventory Settings, Preparation & Cleanup
- Purchasing, Receiving & Depleting Inventory
- Adjustments and Transfers
- Multi-Site and Single Location Tips
- Best Practice Concepts, Techniques and
- Improvement Steps

1. How likely would you be to recommend IDEXX Cornerstone training to a friend or colleague?

No, I would not								Yes, I would	
1	2	3	4	5	6	7	8	9	10

2. Why did you select this rating?

3. Tell us how we did with:	**Poor**								**Fair**		**Excellent**
Course content matching the course description.	1	2	3	4	5	6	7	8	9	10	N/A
Professional looking course materials.	1	2	3	4	5	6	7	8	9	10	N/A
Providing course materials that were valuable.	1	2	3	4	5	6	7	8	9	10	N/A
Arriving well prepared & using appropriate examples.	1	2	3	4	5	6	7	8	9	10	N/A
Using effective communication skills.	1	2	3	4	5	6	7	8	9	10	N/A
Answering all of my questions effectively.	1	2	3	4	5	6	7	8	9	10	N/A
Enabling our practice to expand our use of Cornerstone's features.	1	2	3	4	5	6	7	8	9	10	N/A
Providing good value for the cost.	1	2	3	4	5	6	7	8	9	10	N/A

Comments:

4. Tell us what you think about the length of the course:

☐ Too short ☐ Too long ☐ Just right

5. Did you follow along with the participant workbook during the course presentation?

☐ **Yes** - I followed the participant workbook the majority of the time.

☐ **No** - I didn't use the participant workbook.

☐ **Sometimes** - I used the participant workbook some, but not most, of the time.

6. When prompted, did you complete the training exercises?
(You may have shared a computer with another participant to complete the training exercises)

☐ **Yes** - I/we completed the majority of the training exercises.

☐ **No** - I/we didn't complete the training exercises.

☐ **Sometimes** - I/we completed some, but not the majority, of the training exercises.

7. What was the most valuable aspect of this course?

8. What suggestions do you have for future revisions of this course?

9. Will this course allow you to move forward in completing Inventory Setup?

☐ **Yes** ☐ **No**

10. How many participants from your practice attended some, or all, of this course?

☐ **1** ☐ **2** ☐ **3** ☐ **4 or more**

11. What is your position in your practice?

☐ Veterinarian ☐ Veterinarian/Practice Owner ☐ Office/Practice/Business Manager

☐ Technician/Nurse ☐ Reception/Client Services ☐ Other (specify) _____

Thank you! We appreciate your feedback.

Testimonial Permission:
(Please check the box below)

☐ Please have an IDEXX Computer Systems Representative contact me to discuss featuring my comments in promotional materials.

Please Print:

Your Name: _____

Practice Name: _____

Practice City, State: _____

Practice Telephone #: _____

Please return this Training Evaluation using one of the following methods:

Fax this information to:
Learning & Performance Department at 715-855-5820.

Mail this information to:
IDEXX Computer Systems
Attn: Learning & Performance Department
2536 Alpine Road
Eau Claire, WI 54703

IDEXX LABORATORIES

Section 8

Appendix

15 Steps to Inventory Setup

1. **Classifications/Subclassifications (Lists > Invoice Item Class)**
   Classifications and subclassifications can be used to categorize invoice items in order to generate more specific information in reports, markup or markdown entire groups of similar invoice items, narrow invoice item searches, and create pick lists to use in invoicing. Use this option to add, modify or inactivate classification and subclass information.
2. **Departing Instructions (Lists > Departing Instructions)**
   Use departing instructions to explain the patient care after treatment, surgery or after administering medications or vaccinations. These educational paragraphs recommend needed services and to advise when a return visit is necessary. Invoicing an item that has departing instructions linked automatically prints the departing instructions on the invoice.
3. **Prescription Instructions (Lists > Prescription Instructions)**
   Setting up prescription instructions includes creating a list of instructions and then linking a specific instruction to an invoice item. You can link one (1) prescription instruction per invoice item.
4. **Units of Measure (Controls > Units of Measure)**
   Units of measure are used to designate how invoice items are bought and sold.
5. **Price Change Reasons (Controls > Price Change Reasons)**
   Use price change reasons to specify if invoice item prices can be changed. If prices can be changed, your practice can set up codes to track the reasons prices were changed.
6. **Vendor Setup (Inventory > Vendors)**
   Set up vendors to manage the ordering source for inventory items, placed orders, and received orders. You can link vendors to an individual invoice item.
7. **Locations (Inventory > Locations)**
   Use this feature to designate areas where inventory is being stored. Examples of locations include: Pharmacy, Central Storage, Refrigerator A, Refrigerator B.
8. **Cost Center (Inventory > Cost Centers)**
   Use cost centers to track inventory costs associated with specific areas in your practice for items used within your practice but not invoiced. Examples of cost centers include boarding/kennel, lab supplies, expired drugs, breakage, and truck.
9. **Adjustment Reasons (Inventory > Adjustment Reasons)**
   Adjustment reasons are used to track adjustments of quantity on hand (QOH) within inventory. Examples of adjustment reasons include: broken, cycle count, free sample, unaccounted for, expired, entry error.
10. **Inactivate Invoice Items Not Used (Lists > Invoice Item)**
    Inactivating items not used by the practice will help keep your lists smaller and more pertinent. To inactivate an inventory or service, from the *Invoice Item List* locate the item and click **Update**. Inventory items must have the *Maintain QOH* check box deselected to be marked as inactive.
11. **Setup Inventory Items (Lists > Invoice Item)**
    Setting up inventory items can take a substantial amount of time. Try to pick a category of inventory (Example: canned foods or antibiotics) and complete the setup of those items. Setup includes reorder information and marking the item to Maintain QOH for tracking purposes. Most of the details on inventory reports include QOH information.
12. **Link Inventory Items (Lists > Invoice Item)**
    Inventory items can be linked to services or other inventory items. Linking items can be helpful when you do not want items listed separately on invoices. Examples of inventory items to link include: canine and feline vaccination services should have a dose of the appropriate vaccine linked and the Heartgard® services should have Heartgard® chewable linked.
13. **Receive Past Invoices (Inventory > Receipt List)**
    Enter past invoices from the vendors to allow your facility to see receipt and cost history for the items. **Warning**: DO NOT input past invoices after a physical count has been adjusted within Cornerstone, since receiving orders will add to the current quantity on hand.

14. **Cycle Count**
    Physically count the inventory items marked to maintain quantity on hand.
15. **Adjust Quantity on Hand, Cost and/or Expiration Dates (Inventory > Adjustment List)**
    When you've completed taking a physical inventory, adjust the quantities on hand, cost, and expiration date information.

For expiration date adjustments, see the lesson titled Quantity on Hand and Expiration Date Adjustments.

Set Up Security – Beginning Inventory Management

Security access to Cornerstone Inventory features should be set up prior to establishing Inventory settings and working in Inventory. Security for Inventory is set in Cornerstone and can be located through **Cornerstone > File > Security Setup**. In the following grid you will find a listing of all the Inventory security settings, access suggestions, and the path to locate that feature. It is ultimately the practice's decision-maker that decides who has access to certain areas within Cornerstone Inventory. (Key: Rec = Receptionist, DA = Doctor Associate, TEC = Technician, and OM = Office Manager). In this particular case the OM selections could be substituted for the Inventory Manager, Purchasing Manager, or Purchasing Agent in any give practice. Security will vary based on your practice dynamics and job responsibilities. For security to take affect you will need to close out of Cornerstone and reopen.

Inventory Dialog Security	Access Suggestions				Path to Locate
	REC	DA	TEC	OM	
Inventory				X	Inventory menu
Inventory - Adjustment List				X	Inventory > Adjustment List
Inventory - Adjustment Reason List				X	Inventory > Adjustment Reasons
Inventory - Adjustment Reason Maintenance				X	Inventory > Adjustment Reasons
Inventory - Backorder List				X	Inventory > Backorder List
Inventory - Backorder Maintenance				X	Inventory > Backorder List
Inventory - Cost Adjustment Maintenance				X	Inventory > Adjustment List
Inventory - Cost Center List				X	Inventory > Cost Centers
Inventory - Cost Center Maintenance				X	Inventory > Cost Centers
Inventory - History Purge				X	Tools > History Purge
Inventory - Internal Stock Use				X	Inventory > Internal Stock Use
Inventory - Inventory Details				X	Inventory > Order List
Inventory - Inventory Reports				X	Reports > Inventory
Inventory - Item History and Item Information	X	X	X	X	Inventory > Item History and Item Information Tab
Inventory - Location Group List				X	Inventory > Location Groups
Inventory - Location Group Maintenance				X	Inventory > Location Groups
Inventory - Location List				X	Inventory > Locations
Inventory - Location Maintenance				X	Inventory > Locations
Inventory - Location Type List				X	Inventory > Location Types
Inventory - Location Type Maintenance				X	Inventory > Location Types
Inventory - Order List				X	Inventory > Order List
Inventory - Order Maintenance				X	Inventory > Order List
Inventory - Purchasing Work List				X	Inventory > Purchasing Work List
Inventory - QOH Adjustment Maintenance				X	Inventory > View Quantity on Hand
Inventory - Receipt List				X	Inventory > Receipt List
Inventory - Receipt Maintenance				X	Inventory > Receipt List
Inventory - Return to Vendor				X	Inventory > Return to Vendor
Inventory - Stock Transfer List				X	Inventory > Stock Transfer List
Inventory - Transfer Items				X	Inventory > Find and Transfer Items
Inventory - Vendor List				X	Inventory > Vendors
Inventory - Vendor Maintenance				X	Inventory > Vendors
Inventory - View Quantity on Hand				X	Inventory > View Quantity on Hand
Inventory - Want List	X	X	X	X	Inventory > Want List
Inventory Setup				X	Tools > Inventory Setup

Inventory Reports Security	Access Suggestions				Path to Locate
	REC	DA	TEC	OM	
Inventory - Adjustment Report				X	Reports > Inventory > Inventory - Adjustment Report
Inventory - Audit Open Details Report				X	Reports > Inventory > Inventory - Audit Open Details Report
Inventory - Audit Report				X	Reports > Inventory > Inventory - Audit Report
Inventory - Backorder Report				X	Reports > Inventory > Inventory - Backorder Report
Inventory - Cost Report				X	Reports > Inventory > Inventory - Cost Report
Inventory - Cost Totals Report				X	Reports > Inventory > Inventory - Cost Totals Report
Inventory - Counts Report				X	Reports > Inventory > Inventory - Counts Report
Inventory - Evaluation Report				X	Reports > Inventory > Inventory - Evaluation Report
Inventory - Expiration Date Report				X	Reports > Inventory > Inventory - Expiration Date Report
Inventory - Internal Usage Report				X	Reports > Inventory > Inventory - Internal Usage Report
Inventory - Item Vendor Information Report				X	Reports > Inventory > Inventory - Item Vendor Information Report
Inventory - Item Profit Analysis Report				X	Reports > Inventory > Inventory - Item Profit Analysis Report
Inventory - Linked Items Report				X	Reports > Inventory > Inventory - Linked Items Report
Inventory - On Order Report				X	Reports > Inventory > Inventory - On Order Report
Inventory - Overstock Report				X	Reports > Inventory > Inventory - Overstock Report
Inventory - Partial Receipts Report				X	Reports > Inventory > Inventory - Parital Receipts Report
Inventory - Purchase History Report				X	Reports > Inventory > Inventory - Purchase History Report
Inventory - Receipt Report				X	Reports > Inventory > Inventory - Receipt Report
Inventory - Reorder Report				X	Reports > Inventory > Inventory - Reorder Report
Inventory - Returns Report				X	Reports > Inventory > Inventory - Returns Report
Inventory - Setup Error Report				X	Report will display if an inventory setup task fails.
Inventory - Turnover Report				X	Reports > Inventory > Inventory - Turnover Report
Inventory - Usage Tax Report				X	Reports > Inventory > Inventory - Usage Tax Report
Inventory - Vendor Summary Report				X	Reports > Inventory > Inventory - Vendor Summary Report
Inventory - Want List Report				X	Reports > Inventory > Inventory - Want List Report

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